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CHAPTER 1

INTRODUCING STRATA CS

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About Strata CS

Toshiba's award-winning Strata CS phone system integrates your telephone and computer to make your telephone a much more powerful tool. You can manage your calls and voice mail by using either your telephone or the Strata CS Client program, which runs on your computer. Strata CS dramatically expands the ways in which you can place and receive phone calls.

This manual describes how to use the Strata CS telephone commands, the Client application, and the Web Client. In the Client or the Web Client, click **Help** or press F1 to access online Help.

For instructions on installing the Strata CS Client, see *Strata CS Installation & Maintenance Manual*. For instructions on performing administrative Strata CS functions, see *Strata CS Administrator Manual*.

Accessing Strata CS

You can access Strata CS by:

- Using the telephone
- Using the Strata CS Client application
- Using the Strata CS Web Client
- Using the TAPI Service Provider and the CMA (Contact Manager Assistant)

Using the telephone

Strata CS provides a sophisticated system of voice-guided menus that enable you to access most Strata CS features by using the *telephone commands* on your telephone keypad. You can press **#** at the dial tone, log in, and then follow the voice prompts to listen to your voice mail, forward your calls, record greetings, and so on. When you are on a call, you can press **Flash** to put the call on hold and then follow the prompts to transfer calls, set up conference calls, and perform other call-handling tasks.

For details about how to use the telephone commands, see Chapter 3 through Chapter 6 and the "Telephone Commands Quick Reference" in Appendix A.

Using the Strata CS Client application

The Strata CS Client gives you access to all of Strata CS's features in an easy-to-use Windows interface. With the Client you can point and click to play voice messages, place and receive calls, manage multiple active calls, access contacts and users, and so on. You can install and run the Client on Windows 95, 98, NT, ME, and 2000 computers that are networked to the Strata CS Server.

For details about how to use the Client, see Chapter 7 through Chapter 18.

Using the Strata CS Web Client

If your Strata CS system administrator has installed Strata CS Web Services, you can access a limited version of the Client—called *the Web Client*—by using your Web browser. The Web Client lets you use Strata CS from any remote location that has Internet access and from Macintosh and UNIX computers. All major features of the Strata CS Client are available in the Web Client except those for managing calls or making recordings. You can listen to your voice mail, manage contacts, check your Call Log, customize your Strata CS account, and so forth.

To use the Web Client, ask your Strata CS system administrator for the Web address to enter in your browser. In most cases, the instructions in this manual also apply to the Web Client. You can also use the Web Client's context-sensitive online Help for specific instructions about a Web Client view.

Using the TAPI Service Provider and the CMA

If you make extensive use of contact management applications or customer relationship management software such as Microsoft Outlook, GoldMine, GoldMine FrontOffice 2000, or Act!, you can install the TAPI Service Provider and place calls to contacts from those applications. You do not need to have the Strata CS Client installed on your computer to use the TAPI Service Provider.

The TAPI Service Provider enables you to place calls to contacts by using your contact manager application, just as you can place calls to contacts in the Strata CS Client application. Ask your Strata CS system administrator to install the Strata CS TAPI Service Provider, and then follow the instructions in your contact manager application for placing calls.

You can also install the Strata CS CMA (Contact Manager Assistant) and receive screen-pops for calls that show the name, the caller ID, and the time of day of the call.

You do not need to have the Strata CS Client installed on your computer to use the CMA.

Note: With Interact Commerce Act!, you can receive screen-pops without installing the CMA.

For instructions on how to use the TAPI Service Provider and the Contact Manager Assistant, see their online Help.

Feature comparison table

The following table shows the major Strata CS features that are available. If your Strata CS system does not include some of these features, your Strata CS system administrator might have made them unavailable to you.

Feature	Phone	Client
Managing voice messages	x	x
Placing, receiving, and handling calls	x	x
Managing contacts		x
Call announcing of contacts	x	x
Using workgroups		x
Viewing the Extensions list		x
Viewing the Call Log		x
Recording greetings	x	x
Forwarding calls	x	x
Using routing lists		x
Using call rules		x
Changing active greeting or routing list	x	x
Managing personal statuses		x
Changing personal status	x	x
Customizing options	x	x

Where to get help

You can get help through Strata CS documentation and through technical support.

Strata CS documentation

Strata CS includes the following documentation:

- *Strata CS Administrator Manual*—This manual contains instructions for configuring and managing your Strata CS system, including Strata CS Administrator system settings, licenses, trunks and stations, users, dialing services, auto attendants, inbound and outbound call routing, and system prompts.

- *Strata CS Client User Guide*—This manual describes how to use Strata CS's Client Web Client, Contact Manager Assistant, TAPI Service Provider features, and the telephone commands.
- *Strata CS Call Center Administrator Guide*—This manual contains complete instructions for setting up and maintaining a call center in which multiple agents answer calls to a single number, such as a sales or customer support department.
- *Strata CS Quick Reference Guide*—This quick-start guide for new users describes basic Strata CS commands for the Client and telephone.
- *Strata CS Quick Reference Card*—This wallet-sized card is a convenient reference for the Strata CS telephone commands.
- *SDK and API Programming Guide*—This manual describes how to extend Strata CS's built-in features using the Client API, the IVR Plug-in API, and Device Status API.
- *Online Help*—Context-sensitive Help is available in all Strata CS applications. To access Help in the current dialog box, click the **Help** button or press F1.

The following table shows the Strata CS documentation set and the formats in which it is available.

Document	Printed	Online Book	Acrobat (PDF)
Strata CS Installation & Maintenance Manual	Yes	Yes	Yes
Strata CS Administrator Manual	Yes	Yes	Yes
Strata CS Client User Guide	Yes	Yes	Yes
Strata CS Call Center Administrator Guide	Yes	Yes	Yes
SDK and API Programming Guide	Yes	No	Yes
Strata CS Quick Reference Guide	Yes	No	Yes
Strata CS Quick Reference Card	Yes	Yes	Yes

Notes:

- The online books are available in HTML-based format. To access an online book, click **Help > Online Books** from any Strata CS application.
- The PDF-formatted books are available on the Strata CS CD, in the Manuals directory. Use Adobe Acrobat Reader—also available on the Strata CS CD—to view and print these files.

Technical support

Contact your Strata CS system administrator for technical support. For more information on how to report problems, see Appendix C.

CHAPTER 2

RECORDING YOUR VOICE TITLE AND VOICE-MAIL GREETING

CHAPTER CONTENTS

About recording your voice title and voice-mail greeting

This chapter explains how to create your voice title, create your voice-mail greeting, and manage your greetings using the phone.

When you first begin to use Strata CS, create the following two recordings:

- Your voice title (your name)
- Your voice-mail greeting

You can rerecord these recordings at any time.

Note: Your Strata CS system administrator may have created these recordings for you already, but you can create new ones in your own voice.

Recording your voice title

Your voice title is a short recording of your name only. Strata CS plays it when the following events occur:

- Callers dial your extension or are transferred to you (callers hear "Transferring to" + <voice title>).
- Callers look you up in a name search in the dial-by-name directory (callers hear "For" + <voice title> + "press 1").
- You call another Strata CS user (the user that you are calling hears "Call from" + <voice title>).
- You leave a voice message for another Strata CS user (your voice title precedes the message).

If you do not record a voice title, you may be prompted to say your name when you call another Strata CS user who has call announcing turned on (see "Call announcing" on page 4-2).

Important: Your voice title can contain other information, such as your title, but it should not be a long recording or a greeting. Strata CS plays your voice title in the middle of recorded sentences, so a long voice title can cause confusion.

To record a voice title on the phone

1. Pick up the phone and press **#**. Log in to your account by entering **<your extension> # <your password> #**.
2. Press **6 2** to manage your voice title.
3. Press **1** to record a new voice title. Say your name and then press **#**.

For instructions on how to record a voice title in the Client, see "Recording a voice title" on page 18-2.

Recording your voice-mail greeting

Your voice-mail greeting is a recording that callers hear when they reach your voice mail. For example, your voice-mail greeting might be similar to the following: “This is Miri Anatolia. I am out of the office right now, but leave me a message and I will get back to you soon.” You can also use your voice-mail greeting to tell callers about the following options that are available to them:

- Press **#** after leaving the message for more options.
- Press 7 during the greeting to leave a ringback number before recording your message. (The caller can either leave a caller ID number or enter another number.)
- Press 0 at any time to transfer to the Operator. (By default, 0 transfers the caller to your company’s operator, but you can specify another extension instead. See “Changing your personal Operator” on page 18-6.)
- Press ***** during the greeting to skip the rest of the greeting and begin leaving a message.

Your Strata CS account comes with an initial greeting that callers hear until you record a new one. It says, “The person you have attempted to reach is unavailable. Please leave a message at the tone, then hang up or press the pound key for more options. If you need immediate assistance, press 0.” To record your own greeting, you can record over the initial greeting or record a second greeting.

The active greeting

The *active greeting* is the greeting that Strata CS plays when callers reach your voice mail. You can record and store multiple greetings for different occasions, but only one greeting can be the active greeting. You can designate a different greeting as your active greeting at any time. For example, you can have a greeting that you use under normal working circumstances and an extended-absence greeting that you use when you are on vacation. Before you go on vacation, you can designate the extended absence greeting as your active greeting.

For instructions on how to record greetings and change the active greeting in the Client, see “Managing greetings” on page 12-15.

Recording a new greeting

1. Pick up the phone and press **#**. Log in to your account by entering **<your extension> # <your password> #**.
2. Press **4** to manage your greetings. Your current active greeting plays.

3. Press **4** to rerecord that greeting or **6** to record a new greeting. Say your greeting, and then press **#**. The greeting you just recorded is played back.
4. Follow the prompts to accept, rerecord, or delete the greeting. If you recorded a new greeting, you can make it the active greeting by pressing **3**.

Recording a grab-and-hold greeting

In the Client you can record a special greeting called a grab-and-hold greeting that Strata CS plays to callers when you put incoming calls on hold without talking to the callers first. For more information about how to record and use a grab-and-hold greeting in the Client, see “Using grab-and-hold on the call” on page 10-7.

Managing your greetings

To manage your greetings by using the telephone commands, log in and press **4**. Strata CS plays each of your greetings, beginning with the active greeting. You can use the commands shown in the following table either while you listen to a greeting or after a greeting has played.

Greeting Commands Use while or after a greeting plays	
1	Replay the greeting.
2	Skip to the next greeting.
3	Make this greeting active.
4	Rerecord the greeting.
6	Record a new greeting.
7	Delete the greeting.

When you record a new greeting by using the telephone commands, the greeting appears in the Client’s Greetings view with the name “Greeting.” You can give the greeting a name in the Client (see “Managing views and items” on page 7-10).

Note: When you make a greeting your active greeting by using the telephone commands, the greeting also becomes the personal status default greeting. See “Personal status defaults” on page 8-12.

Available space for greetings

Your Strata CS system administrator has allocated a limited amount of disk space on the Strata CS server for your greetings and all of your voice files. If your existing greetings fill the space allocated to you, you cannot record a new greeting. Ask your Strata CS system administrator for the amount of space you have been allocated and how much of it you have already used.

CHAPTER 3

PLACING CALLS ON THE PHONE

CHAPTER CONTENTS

About placing calls on the phone

You can pick up a Strata CS phone and place a call in the same way that you place calls with other phones. But you can also do much more. For example, you can dial other Strata CS users by name and use special key combinations to redial your last call or call back your last caller. Depending on your Strata CS system, you can also place calls over Centrex lines or over the Internet.

This chapter explains the following aspects of placing Strata CS calls on the phone:

- Dialing internal and external numbers
- Dialing by name
- Placing calls while you are already on a call
- Sending a Flash command to Centrex or another PBX
- Redialing the last number you called, returned the last call that arrived, and disabling call waiting for a call
- Placing calls to an IP address

For information about placing calls visually by using the Strata CS Client, see Chapter 11.

Dialing internal and external numbers

Internal calls are calls to other Strata CS extensions. External calls are calls to outside numbers, including calls to another PBX or to a Centrex extension, calls to another Strata CS system such as a branch office, and Internet calls.

To dial an internal number

1. Pick up the phone.
2. Do one of the following:
   - Dial the extension number.
   - Press **411** or ***93** for the dial-by-name directory.

To dial an external number

You must dial an access code to start dialing an external number. Ask your Strata CS system administrator what types of external calls are available in your system and what access codes you must use.

1. Pick up the phone.
2. Enter **<access code><phone number or IP address>**.

Note: See “Placing calls to an IP address” on page 3-6 for information on entering the IP address.

Example: In the U.S. if you want to call the external phone number **555 1212,** you must dial **9** (the usual access code) before you dial **555 1212**. To place a call over the Internet, you must dial a different access code.

When you dial an external number, you may notice a delay before you hear the number ringing. To eliminate this delay, press **#** after dialing the number.

Entering account codes when placing calls

Depending on your office’s configuration, you may be prompted to enter an account code when you place external calls. Even if you are not prompted for an account code by the system, your office may require you to enter one. Your Strata CS system administrator can tell you what account codes, if any, you must use.

If you are prompted to enter an account code

If you are prompted to enter an account code when you place a call, you will hear one of the following prompts:

- A beep.
- “Please enter account code.”
- A double beep. This indicates that you are dialing a contact who has an associated account code. See “To enter a contact's name and basic information” on page 15-5.

When you hear the prompt, enter the account code followed by **#**. If you hear the double beep, you can enter a new account code or press **#** to use the contact’s associated code.

Depending on how your Strata CS system administrator configured your system, the prompt may occur either after you dial the access code or after you dial the phone number. If the prompt occurs after you dial the access code, enter the account code followed by **#**, and then continue entering the phone number. For example:

9 [prompt] **8812 # 212 123 4567**

where **9** is the access code, **8812** is the account code, and the numbers after **#** are the area code and phone number.

Entering an account code with *11

During a call you can enter an account code or revise the account code entered.

To enter an account code

1. Press **Flash *11**.
2. Enter the account code followed by **#**.
3. Press **Flash** again to return to the call.

You can also enter an account code before dialing the call. Press ***11** at a dial tone, and then enter the account code followed by **#**. When you hear the dial tone, dial the access code and the phone number.

Dialing by name

You can dial another Strata CS user by name if you do not know the user's extension. To dial by name, press **411** or ***93**. The dial-by-name directory prompts you to enter the first few letters of the user's first or last name, depending on your system settings. If Strata CS finds several possible matches, it presents a menu from which you can choose the name of the person you want to call. If it finds one match, it transfers you to that extension. Your Strata CS system may be configured to confirm your choice or allow you to try again. For example, you hear "For Cecilia St. John, press 1. To try again, press *."

Using the Client, you can remove yourself from the dial-by-name directory, so that only callers who know your extension can dial you. See "Customizing your listing in the dial-by-name directory" on page 18-6. If you do not have a Client, your Strata CS system administrator can remove you from the dial-by-name directory.

Placing calls while you are already on a call

You can put calls on hold, pick up another call on hold, and end a call without losing other calls on hold.

Putting your current call on hold and placing a new call

1. Press **Flash #**. The current call is now on hold and you have a dial tone.
2. Dial your call.

Switching between calls

To switch from your current call to a call that is on hold, press **Flash 4**.

Ending a call without losing calls on hold

You can hang up the phone to end a call without losing your calls on hold.

1. Hang up the phone to end the current call.
2. Pick up the phone.
3. Press **Flash 4**. You are connected to the call on hold.

You can also end a call by pressing **Flash 3** instead of hanging up. You can then connect to a call on hold.

Sending a Flash command to Centrex or another PBX

Press **Flash 8** when you want to send a Flash command to your Centrex or other PBX system instead of to Strata CS.

Use this command if you are using Strata CS with Centrex phone lines or with a remote PBX. For example, on a Centrex system you must press **Flash 8** before you can access Centrex features such as transferring within the Centrex group.

You can also use the **Flash 8** command to respond to a call waiting tone from your telephone company. This tone is different than a call waiting tone sent by Strata CS, to which you respond by pressing **Flash** only.

Placing calls with * options

When you press ***** at a dial tone, the system offers you a menu of quick call commands. See page A-2 for a table that lists all available commands.

Redialing the last call

To redial the last call you placed, press ***66**.

Returning the last call

To return a call to your last identified caller, press ***69**. You cannot return unidentified calls.

Disabling call waiting for a call

Disabling call waiting is useful if you are using your extension to send faxes or to connect to the Internet. In both cases, a call waiting tone disrupts the data flow.

To disable call waiting for a call, press ***70** and dial the number. You do not hear the call waiting tone during that call. Incoming calls while you are on that call are sent directly to your voice mail. After the call ends, call waiting is enabled again.

Note: You can enter ***70** as part of your fax dial string. For example, your fax dial string might be ***70 9 1 617 555 7744**.

Placing calls to an IP address

If your Strata CS system supports placing calls over the Internet, you can dial an IP address directly from your phone. In this way you can connect to an H.323 terminal such as NetMeeting.

To dial an IP address, first dial your office's access code for Internet calls. If you do not know the access code, ask your Strata CS system administrator. Then dial the IP address, entering stars (*****) instead of periods. For example, if your office's access code for dialing IP calls is 7, dial the IP address 255.75.119.49 as **7 255*75*119*49**.

CHAPTER 4

ANSWERING AND HANDLING CALLS ON THE PHONE

CHAPTER CONTENTS

About answering and handling calls on the phone

This chapter explains how to answer Strata CS calls at your own phone. It then explains handling Strata CS calls, including putting calls on hold, transferring calls, sending calls to voice mail, and other actions that you can perform at your own phone or at a remote phone. See Chapter 6 for information about "Answering and handling calls at a remote phone".

Using the Flash button on your phone

When you use Strata CS on the phone, you use your phone's **Flash** button to access many commands. If your phone does not have a Flash button, press and release the hook quickly once to send a Flash command.

Note: On some phones, the Flash button is labelled Link or Call Wait.

Answering Strata CS calls

This section explains the following aspects of answering Strata CS calls on the phone:

- Call announcing
- Call waiting
- Answering a call at another ringing phone

Call announcing

Call announcing enables you to screen incoming calls verbally. With call announcing, when you answer your phone you are not connected immediately to the caller. Instead, you hear, "Call from" followed by a recording of the caller's name. You can then choose whether to accept the call or send it to voice mail.

Note: You can also screen your calls visually by using the Strata CS Client's Call Monitor, which displays the caller's name when you receive a call (see Chapter 10). Another way to screen your calls is by using a phone with a caller ID display.

Answering a call using call announcing

After answering a call and hearing the caller's name, you can do one of the following:

- **Press 1 to accept the call.** You are connected with the caller.
- **Press 2 to send the call to voice mail.** The call is sent to your voice mail.
- **Hang up.** The call proceeds to the next step on your routing list. By default, the next step is your voice mail, so hanging up is a quick way of

pressing **2**. If you have customized your routing list, however, the next step might be something different. See “Using routing lists” on page 14-7.

- **Press 3 to send the call to voice mail and monitor the message being left.** The call is sent to your voice mail, and you can listen to the message as it is recorded and pick up the call at any time.

  When you choose this option, you hear your voice mail greeting and the caller’s message as it is being left. The caller cannot hear you.

  To talk to the caller at any time during this process, press **Flash 1**. If you do not want to continue to listen to the message while it is being left, hang up the phone.

- **Press 4 to conference.** This option is available only when call waiting is turned on and you are on a call as another call arrives. The new call is conferenced with you and your current call or calls.

How Strata CS gets the recording of the caller’s name

When you have call announcing turned on, callers who dial your extension hear a prompt that says, “Please say your name.” Strata CS records what the caller says and uses that recording to announce the call.

Callers who have voice titles recorded do not hear this prompt, because Strata CS uses their voice titles to announce the call. This applies to both Strata CS users and contacts. For more information about contacts, see Chapter 15.

You can also turn this prompt off for all callers (see “Customizing or turning off call announcing” on page 18-3).

Call waiting

When you are on a call and another call for you arrives, you hear the call waiting tone (two short beeps). If you have a multiline phone, you see the flashing of another Primary Directory Number. Press **Flash** to switch to the incoming call. The current call is put on hold.

If call announcing is turned off, you are connected to the incoming call immediately. If call announcing is turned on, you hear the call announcing options. See “Answering a call using call announcing” on page 4-2.

Note: Call waiting is not available when you receive Strata CS calls at a remote phone. Therefore, if your calls are forwarded to an external number, or if a call is sent to an external number as a step in a routing list, the call waiting feature is not available.

Call waiting options

The following options can be set in the Client. If you do not have a Client, your Strata CS system administrator can set them for you.

- Turning call waiting off
- Disabling the call waiting beep when you are using the Client

For more information, see “Customizing or turning off call waiting” on page 18-5.

Receiving a call waiting tone from your telephone company

If you receive a call waiting tone from your telephone company, as opposed to a tone from Strata CS, you must press **Flash 8** to answer the call.

Answering a call at another ringing phone

You can easily answer another ringing phone at your own phone.

To answer any ringing phone

1. Pick up your phone and press ***91**. If only one phone is ringing, you are connected immediately to that phone.
2. If more than one phone is ringing, you are prompted to enter the extension of the phone that you want to answer. Enter the number and you will be connected to that phone.

To answer a ringing phone within your workgroup, press ***99**. This command can be handy if several other phones are ringing, but only one of them is within your workgroup. For more information about workgroups, see “Using workgroups” on page 15-13.

See your Strata CS system administrator for information about whether you are in a workgroup and the names of the other members in that workgroup.

Handling calls with the phone

The remaining sections in this chapter describe how to perform the following tasks:

- Putting a call on hold
- Transferring a call
- Sending a call to voice mail
- Disconnecting from a call and remaining on the line
- Creating a conference call
- Parking a call
- Unparking a call
- Putting a call on silent hold

- Getting a dial tone to start another call
- Entering an account code for a call
- Using hands-free answering
- "Using voice-first answering" on page 4-10

For information about how to use the Client's Call Monitor to handle calls visually, see Chapter 10.

Putting a call on hold

After you answer a call, you can put it on hold by pressing **Flash**. To return to the call, press **Flash** again or press **4**.

Notes:

- If you hang up and have a call on hold, the callback feature in Strata CS rings your phone.
- Use Flash rather than the Hold button on your phone. With Flash, callers hear music (if your system has music-on-hold set up). If you use your phone's Hold button, callers hear nothing.
- You cannot put a call to a queue, auto attendant, or IVR Plug-in on hold. If you do, the call is disconnected.

Call-handling commands

When you press **Flash** to put a call on hold, you hear a menu of call-handling commands (see the next table). The caller does not hear this verbal menu.

Call-handling Commands	
1	Transfer the call.
2	Send the call to voice mail.
3	Disconnect from the call.
4	Reconnect to the call.
5	Create a conference call.
6	Park the call.
7	Use silent hold (mutes menu until next keypress).
#	Get a dial tone (start another call).
Flash	Reconnect to the call.

The remainder of this chapter explains these call-handling commands in detail.

Transferring a call

You can transfer a call to another Strata CS extension in one of the following ways:

- **Blind transfer.** Transfer a call without talking to the recipient.
- **Supervised transfer.** Transfer a call if the recipient agrees to accept it.

Note: You can also transfer a call back to the auto attendant (your company's main menu). Ask your Strata CS system administrator for the auto attendant's extension or view it in the Client's Place Call To dialog box.

To perform a blind transfer

1. Press **Flash 1**.
2. Enter the extension to which you want to transfer the call. If you do not know the extension, press **411** and select the recipient by name.
3. Hang up. The call is transferred.

To perform a supervised transfer

1. Press **Flash 1**.
2. Enter the extension to which you want to transfer the call. If you do not know the extension, press **411** and select the recipient by name.
3. Wait for an answer. If the recipient answers, introduce the call. The caller remains on hold.
4. Do one of the following:
   - **To complete the transfer** when the recipient agrees to accept the call, hang up or press **Flash 2**. The call is transferred to the recipient.
   - **To cancel the transfer**, press **Flash 1**. You are disconnected from the recipient and reconnected to the caller. Use this command if the recipient declines the call or does not answer.

Transferring one of multiple calls

To transfer one of multiple calls that are on hold and then return to the other calls, do the following:

1. Press **Flash 1**.
2. The system prompts you to choose the call that you want to transfer. Press the appropriate number.

3. Enter the extension to which you want to transfer the call. If you do not know the extension, press **411** and select the user by name.
4. Complete the transfer in one of the following ways:
   - **Blind transfer.** Hang up the phone to complete the transfer. After a pause, pick up the phone again and press **Flash 4** to return to your calls on hold.
   - **Supervised transfer.** Speak to the recipient as necessary to announce the transfer. To complete the transfer, press **Flash 2**, and then press **4** to return to your calls on hold.

Sending a call to voice mail

You can send a call directly to your voice mail or the voice mail of any user.

1. Press **Flash 2**.
2. Enter the extension of the voice mailbox to which you want to send the call.
3. Hang up.

Disconnecting from a call and remaining on the line

You can disconnect from a call and remain on the line. This capability is useful if you are calling into Strata CS from a remote phone and making a series of outgoing calls through Strata CS. By disconnecting from your current outgoing call only, you do not have to repeatedly dial into Strata CS. Your connection with Strata CS continues, and you can proceed to make more outgoing calls.

To disconnect from your current call at a remote phone, press **Flash 3**. Note that from a remote phone you would press **** 3**.

Creating a conference call

You can create a conference call of up to seven (7) parties in the following ways:

- By adding parties
- By connecting separate calls

To create a conference call by adding parties

1. Dial the first party and wait for an answer.
2. Press **Flash #** for a dial tone to start another call.
3. Dial the second party and wait for an answer.
4. Press **Flash 5**. You and the two parties you called are now conferenced in a single call.

5. Press **Flash #** for a dial tone to start another call. The conference is put on hold, and the parties already in it can continue to talk to each other.
6. Dial another party and wait for an answer.
7. Press **Flash 5** to add the new call to the existing conference call.
8. Repeat steps 5-7 to add more parties to the conference call.

To create a conference call from separate calls

You can also create a conference call from separate, individual calls by pressing **Flash 5**.

When you hear the call waiting beep for an incoming call, you can conference that call with your current call. After the call waiting beep, press **Flash 4**.

Notes:

- Up to seven (7) parties can participate in a conference call.
- You cannot conference two conference calls together.
- When you hang up on an ongoing conference call, the conference continues without you. The other participants can continue to talk, even if you started the conference and your company is paying for the outgoing calls used to create it. To terminate the call, each participant must hang up.

To create conference calls in the Client, see “Working with conference calls” on page 11-8.

Parking a call

Parking a call lets you put a call on hold and pick it up at any Strata CS extension.

1. Press **Flash 6**. Strata CS tells you the call's orbit number. Make a note of it.
2. Hang up.

Unparking a call

1. To retrieve a call, pick up any Strata CS extension and dial ***92**.
2. Enter the orbit number. You are connected to the parked call.

Putting a call on silent hold

Press **Flash 7** to put a caller on “silent hold.” In silent hold, you do not hear the cycling menu prompts. The caller still hears hold music. Silent hold is useful for headset or speakerphone users.

Press any key to resume the menu prompts. From there, you can return to the caller by pressing **4** or **Flash**.

Getting a dial tone to start another call

To put your current call on hold and get a dial tone, press **Flash #**.

In this way you can place new calls without disconnecting from your current call.

Entering an account code for a call

If your company requires you to enter account codes for your calls, you can press **Flash *11** at any time during a call to enter an account code. See “Entering account codes when placing calls” on page 3-3 for more information, including what to do if the system prompts you to enter an account code for an outgoing call.

Using hands-free answering

Hands-free answering is an aid for headset users. Using hands-free answering, you can receive or place calls while the phone is off-hook. Although the phone is off-hook, the dial tone does not play, and the phone does not ring. When an incoming call arrives, a zip tone (a beep) notifies you and Strata CS connects you based on your settings for call announcing.

Enabling and disabling hands-free answering

To enable hands-free answering, press ***10** at the dial tone. You hear, “Hands-free answering is on.” The station is now off-hook and waiting for a call. With hands-free answering enabled, your other telephone commands remain the same. For example, call forwarding and transferring commands do not change.

To disable hands-free answering, press ***10** at dial tone. You hear “Hands-free answering is off.”

Placing and receiving calls with hands-free answering

To place a call using hands-free answering, press **Flash** for a dial tone and then dial the number.

To receive a call, wait for a zip tone (a beep) to notify you of the incoming call. Strata CS connects you based on your call announcing settings (see “Call announcing” on page 4-2). If call announcing is turned off, you are connected to the caller immediately after the zip tone.

To end a call while you are using hands-free answering, press **Flash** and then press **3** to hang up. (If the other party hangs up, that will also end the call.) After the call ends, you may hear dial tone for a brief period of time before you return to off-hook status.

You can cut short the dial tone and return to silent off-hook status by pressing **Flash**.

Creating an overhead paging system with hands-free answering

You can use hands-free answering to connect an extension to an overhead speaker to create a paging system. To broadcast an announcement over the paging system, dial the extension. The zip tone plays over the speaker to signal the beginning of your announcement.

Using voice-first answering

Voice-first answering is an option for users who have Toshiba Strata (digital) phones. When voice-first answering is enabled and you receive a call from another Strata CS station, the system automatically takes your phone off-hook and turns on your phone speaker. A zip tone (a beep) notifies you that an incoming call has arrived, and Strata CS connects you based on your settings for call announcing. When the call ends, the phone speaker is automatically turned off and your phone is returned to on-hook status.

The conditions for receiving a voice-first call are:

- You must have the voice-first answering checkbox checked (see “Enabling and disabling voice-first answering in the Client” on page 10-16).
- The call must be an internal call (a call from another station on your Strata CS system).
- Your active Phone status must not be set to "Do Not Ring My Phone."
- There must be no active calls on your station.
- Your administrator must have voice-first answering enabled for your Strata CS system.

To receive a call, wait for a zip tone (a beep) to notify you of the incoming call. Strata CS connects you based on your call announcing settings (see “Call announcing” on page 4-2). If call announcing is turned off, you are connected to the caller immediately after the zip tone.

Enabling and disabling voice-first answering

To enable voice-first answering, press ***12** at a dial tone. You hear, “Voice-first answering is on.” With voice-first answering enabled, your other telephone commands remain the same. For example, call forwarding and transferring commands do not change.

To disable voice-first answering, press ***12** at a dial tone. You hear “voice-first answering is off.”

Forwarding your calls

You can use the telephone commands to forward your calls, so that your incoming calls ring another phone. You can forward your calls to another extension or an external number.

You can also forward your calls using the Client. See “Forwarding calls” on page 14-2.

To turn on call forwarding

1. Log in to your account by picking up the phone and entering **# <your extension> # <your password> #**.
2. Press **5**.
3. Do one of the following:
   - To forward calls to another extension, press **2** and enter the extension.
   - To forward calls to an external number, press **3** and enter the number, including the access code for the dialing service that you want to use and any prefixes that apply, such as the “1” for long-distance numbers in North America. For example, to forward your calls to a long-distance number by using a standard outside line dialing service, you can enter **9 1 212 123 4567**. (The spaces are shown for clarity.)
4. Follow the prompts to confirm the number entered.

Note: You can use a shortcut to forward your calls to the phone where you are. Log in to your account from that phone, then press **5 1.**

To turn call forwarding off on the phone

1. Log in to your account.
2. Press **5 4**.

To check your call forwarding number:

When you log in to your account while your calls are forwarded, Strata CS reminds you that call forwarding is on and tells you the external number. After you log in, you can check the external number again at any time by pressing **5 5.**

CHAPTER 5

WORKING WITH VOICE MESSAGES ON THE PHONE

CHAPTER CONTENTS

About working with voice messages on the phone

This chapter describes how to work with your voice messages by using the Strata CS telephone commands. It explains the following aspects of working with your voice messages:

- Using new message indicators
- Listening to your voice messages
- Customizing voice message playback order
- Using the voice message telephone commands
- Deleting and undeleting messages
- Replying to a message, forwarding a message, and calling back a message
- Sending a message directly to a user's voice mail
- Voice mail from the caller's point of view
- Selecting a personal status on the phone

For instructions on how to work with voice messages in the Client, see Chapter 12.

Using message indicators

Strata CS can alert you in the following ways when you have new (unheard) voice messages:

- **Stutter dial tone.** When you pick up your phone, the dial tone begins with several short tones, called a *stutter*, and then changes into a regular dial tone. The stutter dial tone indicates that you have new voice messages.
- **Message-waiting light**. If your phone has a CLASS message-waiting light, you can have it flash to indicate new voice messages.
- **E-mail and pager notification**. Strata CS can send you an e-mail message or a page you whenever you receive a new voice message. You can choose to be notified only for urgent messages, and you can schedule notification to occur only during the times you want.

  You can set up notification in the Client. See "E-mail and pager notifications" on page 12-4. If you do not have a Client, your Strata CS system administrator can set up e-mail and pager notification for you.

Note: If you share a phone with one or more users, the message-waiting light and stutter dial tone occur if there are new messages for any of the users assigned to that phone.

Listening to your voice messages

To listen to your voice messages, you must log in to your Strata CS account. You can log in from any Strata CS phone. To log in, pick up the phone and enter:

 # <your extension> # <your password> #

After you log in, press **1** to hear your voice messages.

Quick-dial to hear your voice mail

At your own Strata CS phone, you can enter:

 # # <your password> # 1

Customizing voice message playback order

You can specify in the Client the order in which you hear new and old voice messages when listening by phone. See “Setting voice message playback order” on page 18-9 for more information. If you do not have a Client, your Strata CS system administrator can set this option for you.

Voice message telephone commands

You can use the commands in the following table while you listen to a message or after the message has played.

Voice Message Commands Use while or after a message plays		
1		Replay the message.
2		Skip to the next message.
3		Delete or undelete the message.
4	**1**	Reply to the message.
	2	Forward the message.
	3	Call back the message.
5		Skip to the previous message.
6		Save this message to the Saved folder.
7		Skip back 4 seconds in the current message.
8		Undelete all deleted messages.
9		Skip ahead 4 seconds in the current message.

Voice Message Commands Use while or after a message plays	
#	(During message-received preamble) Skip to beginning of the message.
#	(During message) Skip rest of the message.

Deleting and undeleting messages

After you press **3** to delete a message, you can undelete the message only if you remain in the current voice messages session. If you hang up or back out of the voice messages menu before you undelete a message, you cannot recover the message at all.

Do one of the following to undelete messages while you are in a voice messages session:

- **Press 3 to undelete the current message.** Deleted messages remain in your Inbox during the session. To undelete another message, press **5** until you hear the message and then press **3** to undelete it.
- **Press 8 to undelete all deleted messages.** Doing this changes all deleted messages in your Inbox to old messages.

Replying to a message

When you reply to a message, you are sending a message of your own to a user who sent you voice mail. Your reply message does not include the original message.

To reply to a message

1. Press **4 1** while or after a message plays.
2. If the message was sent to multiple recipients, you reply to the sender only or to the sender and all recipients. To reply to the sender only, press **1**. To reply to the sender and all recipients, press **2**.
3. At the tone, record your reply message. Press **#** when you are done.
4. Press **1** to send your reply. See the table on page 5-3 for other options.

Forwarding a message

When you forward a message, you are sending a copy of a voice message to the voice mail of one or more users. Recipients of the forwarded message hear a message from you before they hear the forwarded message. Your message can

introduce the forwarded message to users. For example, your message might say, “I just received this message about our new product, and I thought the three of you ought to hear it.”

To forward a message

1. Press **4 2** while or after a message plays.
2. At the tone, record your message. Press **#** when you are done.
3. Press **1** to accept your recorded message. See the table on page 5-3 for other options.
4. Enter the extension to which you want to forward the message followed by **#**. If you do not know a user’s extension, press **411** and select the user by name. Enter multiple extensions like this:

   ext1 # ext2 # ext3 # #

   Enter **8888 #** to forward the message to all extensions. Sending a message to all extensions may take a few seconds.

Calling back a message

When you call back a voice message, Strata CS either dials the extension of the Strata CS user, if the message is from a Strata CS user, or dials the external phone number, if caller ID information is available or if the caller has left a ringback number.

Note: If the system cannot dial the ringback number, see your Strata CS system administrator. The call dialing rules set up by your Strata CS system administrator may need to be changed.

To call back a voice message

Press **4 3** while or after a message plays.

You hear a dial tone and then entry of the digits of the phone number that you want to call.

If you want to return to the voice message and listen to it, you can end the call by pressing **Flash 3** or you can wait for the other party to hang up.

Sending a message directly to a user’s voice mail

You can record a message and send it directly to the voice mail of one or more Strata CS users with the telephone commands.

1. Pick up the phone and press **# <your extension> # <your password> #** to log in to your account.
2. Press **3** to send a message.

3. Record your message and press **#** when you are done.
4. Press **1** to accept the recorded message. See the table on page 5-3 for other options.
5. Enter the extension to which you want to send the message and then press **#**. Enter multiple extensions in the following format:

   ext1 # ext2 # ext3 # #

   To send the message to all extensions, enter **8888 #**.

After you record a message, you can use the commands shown in the next table.

Commands for Recorded Messages Use after recording a message	
1	Send the message.
2	Replay the message.
3	Rerecord the message.
4	Append to the end of the voice mail message.
5	Mark the message as Urgent.
6	Mark the message as Private.
7	Enter a ringback number (external number only).
*	Cancel the message.

Note: If you mark a message as Private, the recipient cannot forward it and users who share the recipient's voice mailbox cannot play the message.

Voice mail from the caller's point of view

When callers reach your voice mail, they hear your active greeting followed by a beep that signals the start of the recording. The following options are available to callers, but you must tell callers about them in your greeting if you want callers to use them:

- Press **#** to skip the greeting and go directly to the beep.
- Press **0** to transfer to your office's Operator.
- Press **7** to leave a ringback number. Callers must enter an external number.
- Press **#** for more options after the recording starts.

Selecting a personal status on the phone

Strata CS makes it easy to select a personal status by using only the telephone commands. See Chapter 8 for detailed information about personal statuses.

To select a personal status on the telephone

1. Press **#** and log in.
2. Press **6 1**, and then press:
   - **1** for Available
   - **2** for Do Not Disturb
   - **3** for In a Meeting
   - **4** for Out of the Office
   - **5** for On Vacation
   - **6** for Available (Queue Only)
   - **7** for Available (non-Queue)
   - **8** for On Break
   - **9** for custom personal statuses (followed by **1** to select the first custom status, **2** for the second, and so forth).

Note: Call center agents can select a call center status by picking up the phone and pressing ***51** through ***53**. See “Signing in, signing out, and taking breaks” on page 17-3.

CHAPTER 6

USING STRATA CS AT A REMOTE PHONE

CHAPTER CONTENTS

About using Strata CS at a remote phone

You can access Strata CS at a remote phone (an external, non-Strata CS phone) by calling your office and logging in.

After you log in, you can use the telephone commands as if you were in your office at your desk phone. For example, you can listen to your voice messages, manage your greetings, forward your calls, and perform other tasks. For a full description of the telephone commands, see the chapters on using the telephone (Chapter 3, “Placing Calls on the Phone” , Chapter 4, “Answering and Handling Calls on the Phone” , and Chapter 5, “Working with Voice Messages on the Phone”) and Appendix A, “Telephone Commands Quick Reference” .

After you log in to Strata CS, you can also place new outgoing calls through the Strata CS system if you have the required permissions to do so. See the section “Placing calls through Strata CS” in this chapter.

This chapter presents information about the following:

- Placing Strata CS calls at a remote phone
- Answering Strata CS calls at a remote phone
- Important telephone commands that you must use at a remote phone
- Using the Strata CS Client remotely

Note: When you enter commands at a remote phone, use ** instead of **Flash**.

Logging in at a remote phone

To log in to Strata CS at a remote phone, do the following:

1. Call your office.
2. When the system prompts you to enter an extension, enter **# <your extension> # <your password> #**.

Note: The key that you must use at the first prompt might not be **#** on your Strata CS system. Ask your Strata CS system administrator if your system uses a different key.

Placing calls through Strata CS

To place outgoing calls at a remote phone through Strata CS, you must have the required permissions. For more information, see your Strata CS system administrator.

When you are working remotely and using Strata CS to place outgoing calls, you enjoy the following benefits:

- Your calls are added to your Strata CS Client’s Call Log view, so that you have a record of the number of calls you place and the duration of each one.
- You can put callers on hold, transfer calls, create conference calls, and perform other actions as if you were using your office phone.

Note: At a remote phone, press ** instead of **Flash** to put calls on hold or use call-handling commands such as transfer, conference, and so forth.

The procedures that follow show you how to place calls, receive calls, and end calls as well as how to log off Strata CS at a remote phone.

To place a call through Strata CS

1. Call your office.
2. When the system prompts you to enter an extension, enter **# <your extension> # <your password> #**.
3. Press **#** for a dial tone and dial the call.

To receive calls at a remote phone

1. Call your office.
2. When the system prompts you to enter an extension, enter **# <your extension> # <your password> #**.
3. Press **5 1** to forward calls to the external number from which you are calling.

Note: Call waiting and call announcing do not operate when you receive calls at a remote phone.

To end calls placed at a remote phone

Press ****3** to end each call instead of hanging up the phone.

If you hang up, you must call your office and log in again if you want to place more outgoing calls through Strata CS. Pressing ****3** eliminates the need to call your office again, because you remain connected to Strata CS when you end a call by using ****3**.

To log out of Strata CS at a remote phone

1. Press **#** to get a dial tone.
2. Press ***96**.

If you do not log out in this manner, your Strata CS session continues for a short period of time. After that time, Strata CS automatically ends the session, but if you pick up your phone before that period of time has elapsed, Strata CS still controls the line and assumes that you are calling from within the system (see the example that follows). Therefore, any number you dial will be treated as if it were an extension within Strata CS.

Example: If you are trying to dial a number from your remote phone without using the Strata CS system at your office, and you find your call treated as if it were an internal Strata CS call (that is, if you reach a user at your office), you have probably not logged out correctly from Strata CS. Your recent session has not ended, and Strata CS is handling the call—not your local telephone company. To place the call as a normal (non-Strata CS) call from your remote phone and not through Strata CS, dial ***96**, wait for a dial tone, and then dial your call.

Answering Strata CS calls at a remote phone

When you receive a call from Strata CS while you are at a remote phone—for example, when you receive a work call that is forwarded to your home phone—you can use the Strata CS telephone commands just as if your home phone were a Strata CS station. You can put calls on hold, park calls, transfer calls, forward calls, create conference calls, and do anything else that you can do with the telephone commands at your office phone.

Note, however, the following two telephone commands that you must use when you are at a remote phone:

- Use ****** instead of Flash at a remote phone
- Use ***96** to log off at a remote phone

Using ** instead of Flash

When you are on a Strata CS call at a remote phone, press ****** instead of **Flash** to put your caller on hold and use the telephone commands.

Putting a call on hold at a remote phone

If you are using Strata CS while you are logged in at a remote phone, press ****** instead of **Flash** to put calls on hold and take them off hold. See Chapter 6 for more information.

Logging off at a remote phone

When you are done with your Strata CS call, press ***96** at a dial tone before you hang up your phone. Doing this logs you off of the system. If you do not log off, Strata CS waits a short period of time before ending the session. If you pick up your phone again before that period is over, Strata CS still controls the line and assumes that any call you make is within the Strata CS system.

Using the Web Client

The Web Client is a version of the Strata CS Client that is accessible through your Web browser, depending on your system. With the Web Client you can log on to your Strata CS account from any location on the Internet. You can listen to your voice mail, forward your calls, adjust your account preferences, and perform other tasks.

Web Client limitations

The Web Client provides the same capabilities as the Strata CS Client, with the following two exceptions:

- There is no Call Monitor for real-time call handling.
- You cannot make recordings.

Accessing the Web Client

To access the Web Client, type its address in your Web browser window. See your Strata CS system administrator for the address.

In most cases, the instructions in this manual also apply to the Web Client. You can also use the Web Client's context-sensitive online Help for specific instructions about a Web Client view.

Using the Strata CS Client remotely

If your office's network server is set up so that you can log on to your network by using remote dial-up, you can use the Strata CS Client as if you were on the network at your office. However, the Client is still associated with your Strata CS station, not your remote phone. Therefore, if you want to place and receive calls, use the following guidelines:

- To receive calls, forward your calls to your remote phone.
- Answer incoming calls by picking up the phone. Do not use the **Take Call** command in the Call Monitor view, because that command connects the caller to your office phone.
- Place calls by picking up the phone and dialing. Do not use the Client's **Place Call** command, because that command rings your office phone. If you have permission to do so, you can also place calls through Strata CS by calling your office and logging in. See "Placing calls through Strata CS" on page 6-2.

CHAPTER 7

USING THE STRATA CS CLIENT

CHAPTER CONTENTS

About the Strata CS Client

The Strata CS Client application offers access to all Strata CS commands in an easy-to-use, graphical Windows interface. In the Client you can quickly and easily manage calls, voice messages, contacts, and more.

This chapter explains the following aspects of working in the Strata CS Client:

- Logging on and exiting the Client
- Elements of the Client window
- The Client views
- Working with views and items
- Organizing the contents of a view by using folders
- Sharing views and folders
- Using the audio controls

Overview of the Client views

The Client includes the following **General** views:

- Voice Messages view (see Chapter 12)
- Call Monitor view (see Chapter 11)
- Contacts view (see Chapter 15)
- Extensions view (see Chapter .9)
- Call Log view (see Chapter 13)

The Client also includes the following **Advanced** views:

- Greetings view (see Chapter 12)
- Routing Lists view (see Chapter 14)
- Personal Status view (see Chapter 8)
- Call Rules view (see Chapter 16)
- Workgroups view (see Chapter 15)
- Queue Monitor view (see the *Strata CS Call Center Administrator Guide*)

See your Strata CS system administrator about installing the Client on your computer.

Without the Client, you can still access many Strata CS functions by using the telephone commands. For details, see Chapter 3 through Chapter 6 and the “Telephone Commands Quick Reference” in Appendix A.

Logging on

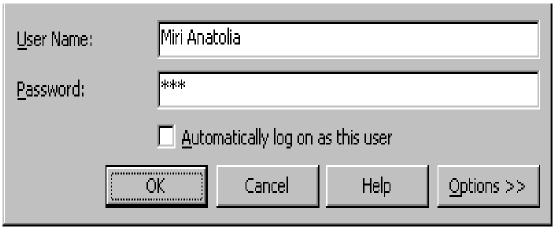
You can log on to the Strata CS Client in the following ways:

- Using your name and password at your workstation, manually or automatically
- At someone else's workstation
- As another user
- Using command line switches

Important: Each Client program must be licensed. If you see a message stating that your Client program is not licensed, you cannot log on. See your Strata CS system administrator for help if such a message appears.

To log on manually or automatically to the Client

1. Choose **Start > Programs > Toshiba Strata CS > Strata CS Client**. The



   Client Log On dialog box opens.
2. Type your user name in the **User Name** field. If you do not know your user name, ask your Strata CS system administrator.
3. Type your numeric password in the **Password** field. Use the same password that you use to log on to Strata CS on the phone.
4. If you want to skip the process of logging on to the Strata CS Client in future sessions, check **Automatically log on as this user**.

   Note: If you check **Automatically log on as this user**, anyone at your computer can open your Client program and listen to your voice messages, because the Client will open without requiring a password.
5. Optionally, click **Options** to specify your station ID and the Strata CS Server that you are connecting to. See "Changing the Strata CS Server and station ID" on page 7-4.
6. Click **OK**.

To reset Strata CS so that a password is required

1. Choose **Tools > Options**. The Options dialog box opens.
2. On the General tab, uncheck **Log on automatically**.
3. Click **OK**.

Changing the Strata CS Server and station ID

When the Client is installed, your computer is configured so that the Client uses:

- A specific Strata CS Server
- A specific telephone represented by a number (the *station ID* number)

You can change these settings whenever you log on. You would need to do so in the following circumstances:

- You are running the Client for the first time
- You want to connect to a different Strata CS Server on your network
- Your computer needs to be connected to a different phone (for example, it has moved to a different office)
- The network computer name of the Strata CS Server has changed

To change the Strata CS Server or station ID

1. Start the Client program. If your system logs you on automatically, choose **File > Log on as a different user** after you start the Client.
2. Click **Options** in the Client Log On dialog box to view the expanded Client Log On dialog box.

3. Select a Server name on the **Server** drop-down list.
4. Enter a valid station ID in the **Station ID** field. Press *** 0** on a Strata CS phone to determine that phone's station ID.
5. Click **OK**.

Logging on at another workstation

You can log on to the Client at a workstation other than your own and have full access to your own Strata CS account. Incoming calls for you still ring your own phone, but they also appear in the Call Monitor view of the Client at the workstation at which you are located. If you choose **Take Call** in the Call Monitor view, the phone at that workstation rings and connects you to the caller. See Chapter 10 for instructions on using the Call Monitor view.

To have your incoming calls ring a phone other than your own, use call forwarding. See “Forwarding calls” on page 14-2.

While you are logged on to the Client at another location, you can place outgoing calls from that workstation’s phone as yourself—in other words, your name appears in the Call Log view, and your dialing restrictions and permissions apply. If you call from another user’s phone without logging in, Strata CS assumes you are the other user. That user’s name and dialing restrictions are used.

Logging on as a different user

You can log on as a different user without exiting and restarting the Client program. This makes it easy to log on to another user’s account from your Client. You must know the other user’s password to log on to another account.

1. Choose **File > Log on as a different user**. The Strata CS Client Log On dialog box opens.
2. Enter the user name under which you want to log on, and then enter the password.
3. Click **OK**.

Changing your password

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click **Change Password**. The Change Password dialog box opens.
3. Enter your current password under **Old password**, enter your new password under **New password**, and then retype your new password in the **Verify new password** field.
4. Click **OK** to close the Change Password dialog box, and then click **OK** to close the Options dialog box.

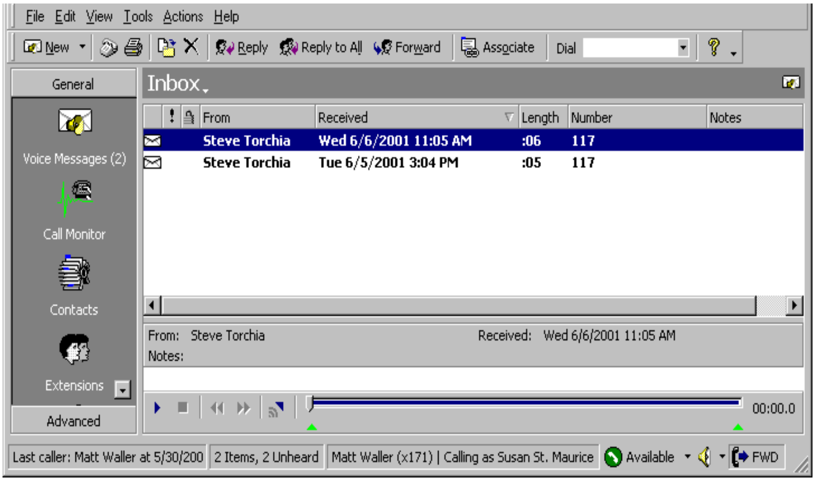
Logging on with command-line switches

You can add switches to the Windows shortcut command line that starts the Client. The command line switches let you run the Client if you have two phones at your desk, so that you can turn on debugging data and perform other tasks. See Appendix B for more information.

Exiting the Client

To exit the Client, choose **File > Exit**. If you have several Client windows open, you can close them all at the same time by choosing **File > Exit and LogOff**.

Elements of the Client window



The Client window contains the following elements:

- The menu bar
- The toolbar
- The view bar
- The folder list
- The status bar
- The Client view that is currently displayed (see “The Client views” on page 7-8)

The menu bar

The *menu bar*, at the top of the Client, provides access to Strata CS commands. Click each menu to see the commands that menu contains. Menu commands are referenced in this manual in the format **File > New > Contact**.

The toolbar

The *toolbar*, directly under the menu bar in each view, provides single-click access to frequently used Strata CS commands.

Some views contain toolbar buttons that are not found in other views.

In any view, clicking the left-most toolbar button creates a new item for that view. For example, in the Call Monitor view, clicking the left-most button lets you place a new call: 

You can also click the small arrow to the right of that button for a menu that lets you create any new Client item. The arrow is available in every view.

The view bar

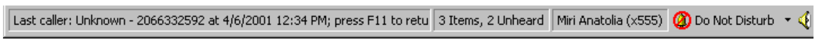
The *view bar*, the vertical pane on the left side of the Client, provides single-click access to the Client views. See “The Client views” on page 7-8.

The Folder List

The *folder list* is a vertical pane next to the view bar. It provides access to the Client views and their associated folders, public Strata CS information in your office, and folders that other users have shared with you. When you first start the Client, the Folder List is hidden. To show it, choose **View > Folder List**. See “Using the Folder List” on page 7-16.

The status bar

The *status bar* is located at the bottom of the Client window.



The status bar gives you quick access to the following information:

Hiding and showing Client window elements

You can hide or show each of the Client window elements except the menu bar. Use the **View** menu commands to toggle an element between hidden and shown. For example, to hide or show the status bar choose **View > Status bar**.

Customizing the Client display

You can further customize the appearance and features of the Client. See “Customizing the Client display” on page 18-10 for more information.

The Client views

The Strata CS Client contains *views*, which appear in the main part of the Client window and give you access to specific Strata CS functions.

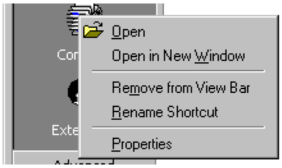
To open a view

1. Click **General** or **Advanced** in the view bar and locate the view that you want to open.
2. Click the view's button.

Note: You can also open a view by clicking its icon in the folder list.

For an overview of each view, see the next table.

You can have several views open at once by opening each view in its own window. To open a view in its own window, right-click a view button in the view bar and then choose **Open in New Window** on the shortcut menu.



When you want to shut down the Client, you can close all Client windows at the same time by choosing **File > Exit and Log Off** on the main menu.

Important: Some views may not be available to you. Your Strata CS system administrator controls the settings that determine the views that your Client program displays.

The Strata CS Client Views		
	General	
	**Voice Messages**	Hear, manage, and archive your voice messages. See Chapter 12.
	**Call Monitor**	Place calls and handle incoming calls (transfer calls, create conference calls, and listen to voice mail as it is being left). See Chapter 11.
	**Contacts**	Manage an online phone book of your telephone contacts. See Chapter 15.

The Strata CS Client Views		
	Extensions	View all Strata CS extensions, their personal statuses, and who is on the phone now. See Chapter .9.
	Call Log	View a record of all your phone calls and perform other actions. See Chapter 13.
		Advanced
	Greetings	Record your voice-mail greetings and change the active greeting. See Chapter 12.
	Routing Lists	Set up “follow me” call forwarding and direct calls to workgroups or other extensions. See Chapter 14.
	Personal Status	Set up a personal status (a group of several settings) that indicates your availability and location to others. Personal statuses also govern the greetings used, the routing lists used, and whether your phone does or does not ring. See Chapter 8.
	Call Rules	Set up custom call handling for individual callers or for specific dates or times. See Chapter 16.
	Workgroups	Define groups of users and contacts for common call-handling purposes and for quick access when transferring calls. See Chapter 15.
	Queue Monitor	View up-to-date statistics for call center queues. Available only for call center agents with permission to use it.

Adding the Calls pane to any open view

The Calls pane contains the same information that appears in the Call Monitor view. You can display the Calls pane in any Client view and see and act on your incoming calls.

To add the Calls pane to a view, do the following:

1. Open the view to which you want to add the Calls pane.
2. Choose **View > Calls Pane**.
3. Select a location from the menu to place the Calls pane.

To remove the Call Monitor pane from a view, choose **View > Calls Pane > None.**

Adding the Extensions pane to the Call Monitor view

The Extensions pane contains the same information that appears in the Extensions view. Adding the Extensions pane to the Call Monitor view lets you see whether users are available before you place or transfer calls to them. You can also perform drag-and-drop call handling operations in the Call Monitor when the Extensions pane is open. See “Dragging and dropping items” on page 7-13.

To add the Extensions pane to the Call Monitor view, choose **View > Extensions Pane**, and then select a location on the menu.

To remove the Extensions pane from the Call Monitor view, choose **View > Extensions Pane > None.**

Managing views and items

This section explains the following:

- Using commands in Strata CS
- Performing actions on items in views
- Printing items in a view

Items are individual greetings, contacts, routing lists, personal statuses, workgroups, and call rules that you create in Strata CS. One item appears on each row in a view. For example, one contact appears on each row in the Contacts view.

Using commands in a view

You can use commands in a view by doing any of the following:

- **Choose a command on the view’s menu bar.** For example, in the Inbox folder of the Voice Messages view, choose the **Actions** menu and click a command.
- **Click a toolbar button.** Position the mouse pointer over a button to see its action.
- **Right-click an item and choose a command on the shortcut menu**.

Commands always affect only the item or items selected. Right-clicking an item selects it and opens a shortcut menu that contains commands, so it is often the fastest way to perform an action.

Managing items in the views

This section is a guide to managing individual items in a view:

- Creating items
- Deleting voice messages and other items
- Renaming items
- Cutting and pasting items
- Copying and pasting items
- Dragging and dropping items

You may not be able to perform these actions if you do not have the required permission.

Creating new items

You can create all types of new Strata CS items, such as greetings and call rules, in any view.

To create a new item, choose **File > New** and choose an item, such as a contact or a greeting. Enter the information about the new item in the dialog box that opens. Click **OK** to create the item. You cannot create extensions.

To create a new item that is based on an existing item

1. Select the item on which you want to base a new item, such as a contact in the Contacts view.
2. Choose **Edit > Copy**.
3. Choose **Edit > Paste**. A Contact dialog box opens. **Copy of <item that you copied>** appears in the title bar of the dialog box. The dialog box contains a duplicate of the selected item's information, such as name, phone number, and so forth. You can use the this information as a basis for creating a new item.
4. Enter the information about the new item in the dialog box.
5. Click **OK** to save the changes as a new item.

Deleting voice messages and other items

To delete a voice message, press DELETE. The voice message moves to your Deleted folder.

To permanently delete a voice message from your Inbox

1. Select the voice message. To select more than one voice message, press CTRL and select them.
2. Press SHIFT+DEL. A confirmation dialog box opens.
3. Do one of the following:
   - Click **Yes** if you want the selected voice message to be permanently removed from your computer.
   - Click **No** to keep the voice message in your Inbox.

To delete other items

1. In the view in which the item appears, select the item. To select more than one item, press CTRL and click each one that you want to delete.
2. Right-click the selected item and choose **Delete** on the shortcut menu. A confirmation dialog box opens.

   Note: When you delete an item that is not a voice message, such as a greeting or a call rule, the item is permanently and irretrievably removed from your computer. You cannot recover it after you delete it.

3. Click **OK** to permanently delete the item.

Renaming items

Some types of items, such as default personal statuses or the Standard routing list, cannot be renamed.

To rename an item

1. Double-click the item to open its properties dialog box.
2. In the **Name** field, type a new name for the item.
3. Click **OK**.

Cutting and pasting items

Cutting a row in the Contacts, Greetings, Routing Lists, Personal Status, Call Rules, and Workgroups views deletes the item on that row and places it on the clipboard.

To create a new item based on an existing item and delete the existing item

1. Select the item that you want to delete and on which you want to base a new item, such as a contact in the Contacts view.
2. Choose **Edit > Cut**.
3. Choose **Edit > Paste**. A Contact dialog box opens. **Copy of <item that you copied>** appears in the title bar of the dialog box. The dialog box contains a duplicate of the selected item’s information, such as name, phone number, and so forth. You can use this information as a basis for creating a new item.
4. Enter the information about the new item in the dialog box.
5. Click **OK** to save the changes as a new item.

Copying and pasting items

Copying a row in the Contacts, Greetings, Routing Lists, Personal Status, Call Rules, and Workgroups views places a copy of the item in that row on the clipboard as text. This information can be pasted into other applications, such as a text program.

Choose **Edit > Copy** to place a copy of selected items on your clipboard. Choose **Edit > Paste** to paste the items. Use this method to paste Call Log entries and voice message information into the Problem Report Wizard (See “To run the Problem Report Wizard” on page C-2.).

For information about creating a new item by copying an existing item, see page 7-11.

Dragging and dropping items

You can drag and drop one item onto another item to perform actions such as making a call, transferring a call, and adding a call to a conference. You can also move an item to a folder or a view.

For example, if you drag an active call in your Call Monitor view onto a user in the Extensions pane, the call will transfer to that user. Conversely, you can drag a user from the Extensions pane to the Call Monitor view to call that user.

The following table lists the drag-and-drop actions you can perform in the Strata CS Client. The From column shows the items you can click and drag. The To column shows the destination items. The remaining columns show the actions that result when you drag and drop an item or use the SHIFT and CTRL keys in conjunction with dragging and dropping.

From	To	Drag	SHIFT + Drag	CTRL + Drag
Call	**Call**	No action	Opens the Conference dialog box	Conferences the calls
	Extension, Contact, Call Log, Voice Message	Performs a blind transfer	Opens the Transfer dialog box	Performs a supervised transfer
Call Log	**Call**	Conferences the Call Log party with the call	Opens the Conference dialog box	
	Empty Call Monitor	Places a call to the Call Log party	Opens the Place Call To dialog box	
Contact	**Call**	Conferences the contact's default number with the call	Opens the Conference dialog box	
	Empty Call Monitor	Places a call to the default phone number	Opens the Place Call To dialog box	
	Folder	Moves the contact to the folder	Opens the Move Item dialog box	Copies the folder

From	To	Drag	SHIFT + Drag	CTRL + Drag
Folder	**Folder**	Moves the folder to another folder	Opens the Move Folder dialog box	
	Contact	Moves the folder to the Contacts folder	Opens the Move Folder dialog box	
	Voice Messages	Moves the folder to the voice Message folder	Opens the Move Folder dialog box	
Voice Message	**Call**	Conferences the message sender with the call	Opens the Conference dialog box	
	Empty Call Monitor	Places a call to the message caller ID	Opens the Place Call To dialog box	
	Folder	Moves the message to a folder	Opens the Move Item dialog box	Copies the message
Extension (User, Auto Attendant, Queue, or IVR Plug-in)	**Call**	Conferences the call	Opens the Conference dialog box	
	Empty Call Monitor	Places the call	Opens the Place Call To dialog box	

Printing items in views

To print the contents of a view, choose **File > Print**. When you print a view that contains several columns, you may need to change the orientation of the page to so that all columns that appear in the view are printed.

Organizing the contents of a view in folders

A folder is a subdivision of a view that lets you organize the contents of that view. For example, in the Contacts view you can create a Business folder and a Personal folder, and then organize your contacts in these folders. You can then click the Personal folder to view only your personal contacts in the Personal Contacts view.

You can create folders within the Voice Messages and Contacts views. You can create as many folders as you want, and you can nest folders within other folders.

The Voice Messages view contains one folder already created, the Saved folder. When you listen to a voice message on the telephone and save it, the message is moved into the Saved folder.

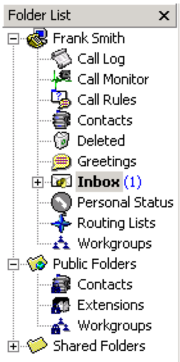
Private and public folders

The Client displays the following types of folders in the Folder list:

- **Private folders.** Folders that you create and that appear in your Client only, unless you share them with other users. See “Sharing views and folders” on page 7-19.
- **Public folders.** Folders that are visible to all Strata CS users. See “Viewing public folders” on page 7-18.

Using the Folder List

Use the folder list to view folders. If the folder list is not visible, choose **View > Folder List**.



Folders that contain other folders are marked by an expansion symbol (a plus or minus sign). Click the symbol to hide or show the folders within the selected folder.

You can use the folder list to select folders to display and views to display. When you click a view in the folder list, the view opens in the Client window.

Note: The folder for the Extensions view appears under **Public Folders** in the folder list.

Viewing the folder list temporarily

You can display the folder list temporarily by clicking the folder title at the top of the view.

The folder list remains open in the Client window until you click elsewhere in the window. To keep the folder list open, click the push-pin button in the upper right corner of the folder list.

Managing folders

This section is a guide to basic actions you can perform on folders. The views that support folders are the Voice Messages view and the Contacts view.

Creating folders

1. Choose **File > Folder > New Folder**. The Create New Folder dialog box opens.
2. Under **Name**, type a name for the new folder.
3. Under **Select where to place the folder**, click the view or folder within which you want to place the new folder. The views that support folders are the Voice Messages view and the Contacts view.
4. Click **OK**.

After you create a folder, it appears in the folder list.

Deleting folders

1. In the folder list, click the folder that you want to delete.
2. Choose **File > Folder > Delete**. The folder and any contents is moved to the Deleted folder. To delete a folder permanently, you must delete it from the Deleted folder or empty the Deleted folder by choosing **Tools > Empty Deleted Folder**.

Renaming folders

1. In the folder list, click the folder that you want to rename.
2. Type a new name for the folder.
3. Press ENTER to complete the name change.

Adding folders to the view bar

You can add a folder to the view bar for easier access.

1. In the folder list, click the folder that you want to add to the view bar.
2. Choose **File > Folder > Add to View Bar**.

Moving items between folders

1. In the folder list, select the folder that contains the items you want to move to a target folder. The contents of the folder appears in the Client window.
2. Select one or more items that you want to move.
3. Drag the selected items to the target folder in the folder list.

Viewing public folders

Public folders contain items that all Strata CS users can view and use. For example, any user can view a public contact's information or place a call to that contact.

Example: Your company defines its departments as public workgroups. All users in the company can view the members of those workgroups.

To view public folders, click Public Folders in the folder list.

Note: Items in public folders are not generally available for editing or deleting. You must have special permission to edit a public item.

Managing the Deleted folder

The Deleted folder contains voice messages that you have deleted from the View Messages view or a folder. Items in the Deleted folder continue to be stored in the limited space that has been allocated to you for your voice files. To regain space for more voice messages or other voice files, empty your Deleted folder.

To view the contents of the Deleted folder, click it in the folder list.

Emptying the Deleted folder

You can delete an item from the Deleted folder just as you would from any view or folder. When items are deleted from the Deleted folder, they are deleted permanently.

To empty the Deleted folder, choose **Tools > Empty Deleted Folder**.

To empty the Deleted folder automatically

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the Voice Messages tab.
3. Choose one of the following options:
   - To delete all messages in the Deleted folder now, click **Remove all items now**. The messages are deleted when you click **OK** to close the Options dialog box.
   - To empty the Deleted folder automatically whenever you exit the Client, check **Remove all items when exiting**.
   - To remove old items automatically from the Deleted folder, check **Periodically remove old items**, and then enter the age in days at which an item is automatically removed. For example, if you enter 3, items are automatically removed after they have been in the Deleted folder for three days.
4. Click **OK**.

Sharing views and folders

You can share some Strata CS views and folders with other Strata CS users. Those users can access the shared views or folders from their folder lists according to access levels that you specify. You can grant individual users specific levels of access to your shared views and folders.

Note: Voice messages marked Private do not appear in a shared folder.

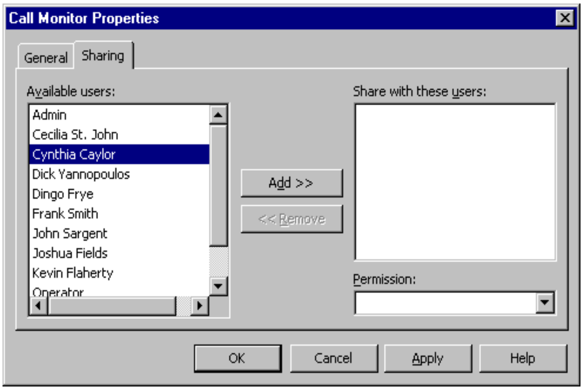
Example: If you and two coworkers are working on the Gould project, you can create a Contacts folder called “Gould” in which you keep important contacts at the Gould office. You can share the Gould folder with your two coworkers, so that all three of you have access to Gould contacts’ phone numbers.

You can share the following views, and any folders within them:

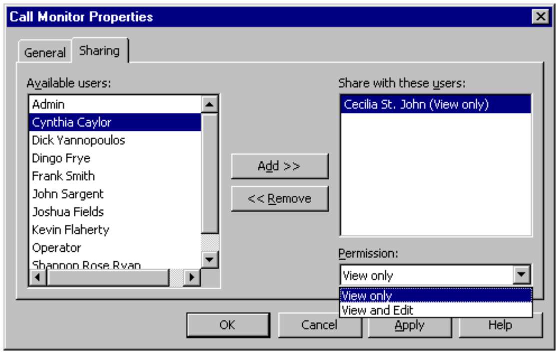
- The Call Monitor view
- The Voice Messages view
- The Contacts view

To share a view or folder

1. In the folder list, click the view or folder that you want to share. In the remainder of this procedure, “folder” refers to both views and folders.
2. Choose **File > Folder > Share Folder**. The Sharing tab of the folder’s Properties dialog box open.



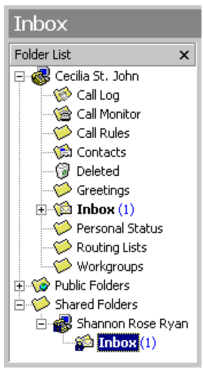
3. Select the users in the **Available Users** list with whom you want to share the folder. To select multiple users, press CTRL as you select users.
4. Click **Add**. The selected users are moved to the **Share with these users** list.
5. To change the access level for a user, select the user in the **Share with these users** list, and then select one of the following from the **Permission** drop-down list:
   - **View only.** The user can view or listen to items in this folder, but cannot edit or delete them.
   - **View and Edit.** The user can view, listen to, edit, delete, or move items in this folder. The user cannot play your Private voice messages or associate the phone number from a shared message with a contact.



6. Click **Apply** to save your changes and continue to work on the Sharing tab. When you are done, click **OK**. The folder is now shared with the users in the **Share with these users** list.

Viewing shared folders

To view folders or views that another user has shared with you, open **Shared Folders** at the bottom of the folders list and open the folder of the other user to view the shared folders.

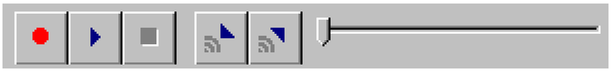


Deleting shared items

If you have permission to do so, you can delete voice messages from folders that other users shared with you. If those users also shared their Deleted folders with you, the message moves to their Deleted folders. If not, the message is permanently removed.

Using the audio controls

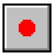
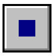
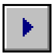
Strata CS’s audio controls make it easy to create and listen to recordings by using the following audio controls.



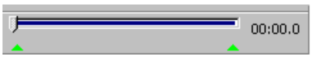
You will find these controls throughout the Client wherever you can create or listen to recordings.

Recording and playing messages

You create recordings by speaking into your phone.

	**Record**	When you are ready to record, pick up your phone, and then click the button. A beep signals that recording has begun.
	**Stop**	When you are done recording, you can either hang up or click the button.
	**Play**	To hear what you recorded, click the button.

To move forward and backward within the recording, drag the slider bar:

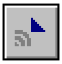


Using voice file bookmarks

In some dialog boxes in the Client you can set bookmarks in voice files by dragging the arrows that appear under the slider bar. When you play a message that has bookmarks, only the portion of the file between the bookmarks plays. This capability can be useful, for example, when you want to mark the location of an important phone number in a voice message.

Importing and exporting voice files

To import or export a voice file, use the buttons on the recording control:

	**Import**	You can import a voice file in .WAV or .VOX format to use for any Client recording (greetings, voice titles, and so on). Strata CS can import .WAV files with a frequency of 8Khz, 11.025 Khz, 22.05 Khz, or 44.1 Khz. You can also import an 8 kHz PCM .VOX file (μ-law format for North America and Japan, a-law format for other countries).
	**Export**	You can export any of your Client recordings, including voice messages and recorded conversations, to a .WAV file on your hard disk.

Importing and Exporting Strata CS items

You can import contacts into Strata CS from a .CSV file, and you can export contacts to a .CSV file. You can also export extensions and the Call Log to .CSV files. Click **File > Import and Export** to open the Import and Export Wizard.

Importing and exporting contacts

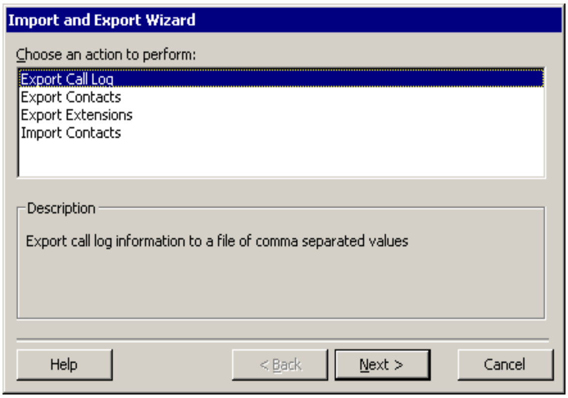
You can import contacts into Strata CS:

- From a .CSV (comma-separated value) file generated from Strata CS
- From a .CSV file generated from another contact manager such as Microsoft Outlook

You can export contacts from Strata CS to a .CSV (comma-separated value) file that you can import into another Strata CS Client, Outlook, GoldMine, FrontOffice 2000, Act!, or other contact management software.

To import contacts from a .CSV file

1. Choose **File > Import and Export**. The Import and Export Wizard opens.

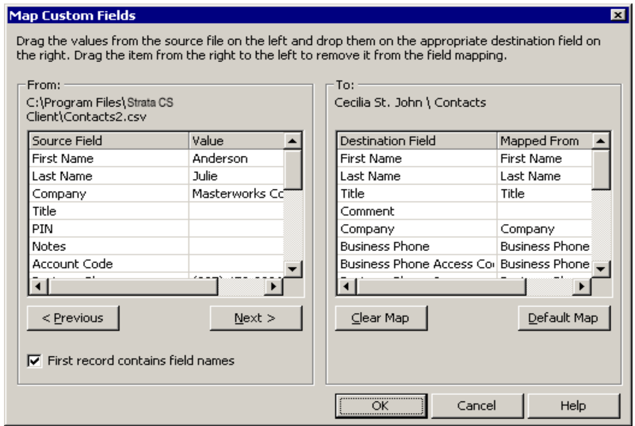


2. Select **Import Contacts**, and then click **Next**.

3. Click **Browse** and select the .CSV file that you want to import.
4. In **Destination folder**, select the Strata CS Contact folder into which you want to import the contacts in the .CSV file.
5. Under **Options**, select one of the following:
   - **Replace duplicates with items imported.** If Strata CS finds a duplicate contact in the .CSV file, the contact from the file will replace the existing Strata CS contact.
   - **Allow duplicates to be created.** If Strata CS finds a duplicate contact in the .CSV file, it will import all contacts, even those that are duplicates of Strata CS contacts.

- **Do not import duplicate items.** If Strata CS finds duplicate contacts in the .CSV file, it will not import them.

6. Select **Use phone numbers as caller identification for these contacts** to add the imported contacts' phone numbers to Strata CS's list of caller ID numbers so that contacts can be identified when they call. For more information, see "You can teach Strata CS to recognize contacts when they call." on page 15-8.
7. If you are importing a file that was created by Strata CS, go to step 10.
8. If you are importing contacts from another application, click **Map Custom Fields**.



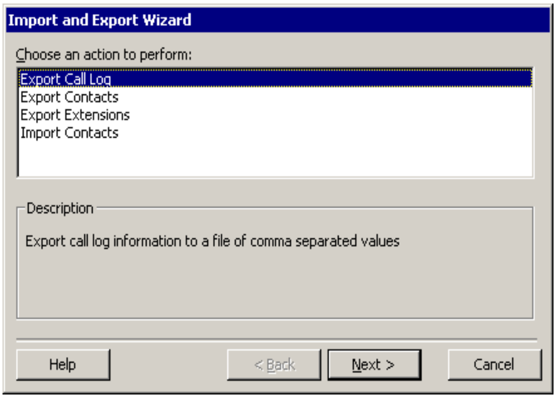
9. Map the fields as follows:
   - Check **First record contains field names** at the bottom of the dialog box if the .CSV file's first record consists of the names of fields. Then drag fields from the left pane (the .CSV file) to the fields in the right pane (Strata CS contacts) in which you want the values to appear. Drag unwanted default field mapping from the right pane to the left pane.
   - Click **Previous** or **Next** to view other records in the .CSV file.
   - Click **Clear Map** to remove all mapping from the right pane.
   - Click **Default Map** to restore the default mapping.

   When you are finished mapping fields, click **OK**.
10. Click **Next** in the Import and Export Wizard, and then click **Finish**. The contacts in the .CSV file are imported.

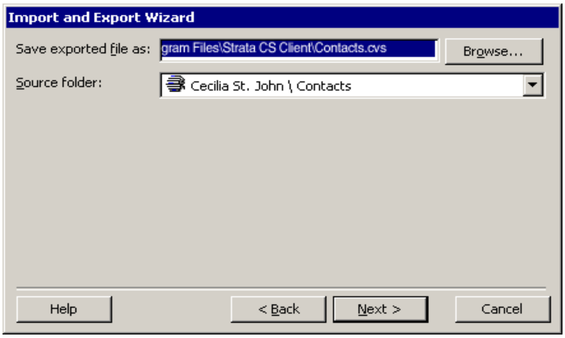
Note: When text is imported from a .CSV file, a comma in the text breaks the text between fields unless the text is within quotation marks.

To export contacts to a .CSV file

1. Choose **File > Import and Export**. The Import and Export Wizard opens.



2. Under **Choose an action to perform,** select **Export Contacts**, and then click **Next**.

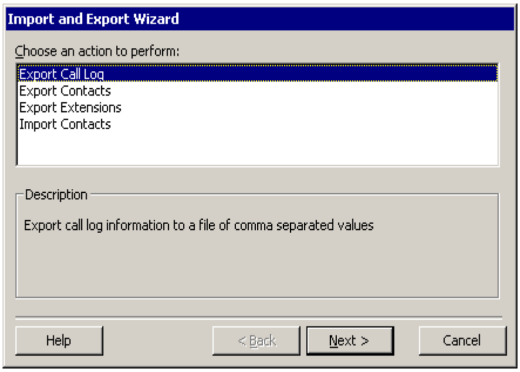


3. Under **Save exported file as,** browse to the folder in which you want to save the .CSV file.
4. Under **Source folder**, choose the Contacts file that you want to export, and then click **Next**.
5. Click **Finish**. The .CSV file is exported.

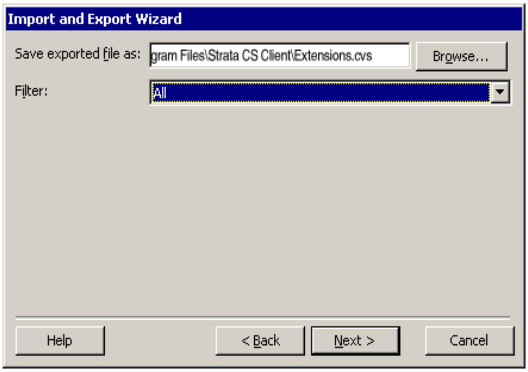
Exporting the Extensions view

You can export the Extensions view to a .CSV file for use in other applications.

1. Click **File > Import and Export**. The Import and Export Wizard opens.



2. Under **Choose an action to perform**, select **Export Extensions** and click **Next**.

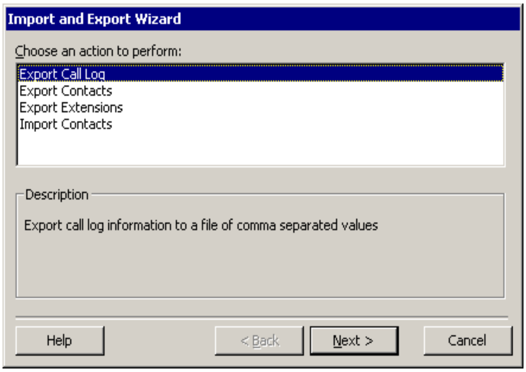


3. Under **Save exported file as**, browse to the folder in which you want to save the .CSV file.
4. Under **Filter**, choose the extensions or workgroups that you want to export, and then click **Next**.
5. Click **Finish** to complete the export or **Cancel** to close the Wizard without performing any action.

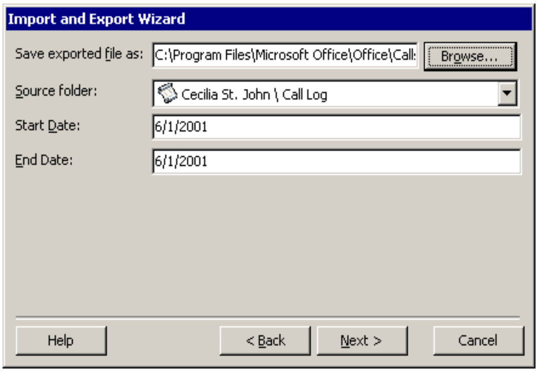
Exporting the Call Log

You can export your Call Log to a .CSV file that can be read and analyzed in a spreadsheet program such as Microsoft Excel.

1. Choose **File > Import and Export**. The Import and Export Wizard opens.



2. Click **Export Call Log**, and then click **Next**.



3. Click **Browse** and then specify a file name and destination for the Call Log file.

4. Enter the **Start Date** and the **End Date** for the portion of the Call Log that you want to export. Enter dates in the numerical format mm/dd/yyyy.

5. Click **Next** and then click **Finish**.The portion of the Call Log that you specified is saved to the .CSV file.

CHAPTER 8

USING PERSONAL STATUS

CHAPTER CONTENTS

About personal status

Your personal status tells Strata CS how to handle your calls and it lets your colleagues know where you are and what you are doing. It also specifies how you want your calls to be handled under specific circumstances.

A personal status consists of the following:

- A personal status icon and a name, such as Available. These appear next to your name in the Extensions view, so that other Strata CS users can see at a glance whether you are in the office and available. Likewise, by looking at the Extensions view you can see the personal status of other users. For example, if the Extension view shows Helen Shire in the personal status On Vacation, you would know not to call her.
- A collection of preferences that determines how your incoming calls are handled. For example, the Do Not Disturb status sends your incoming calls directly to voice mail without ringing your phone.

Each personal status consists of the following call handling preferences:

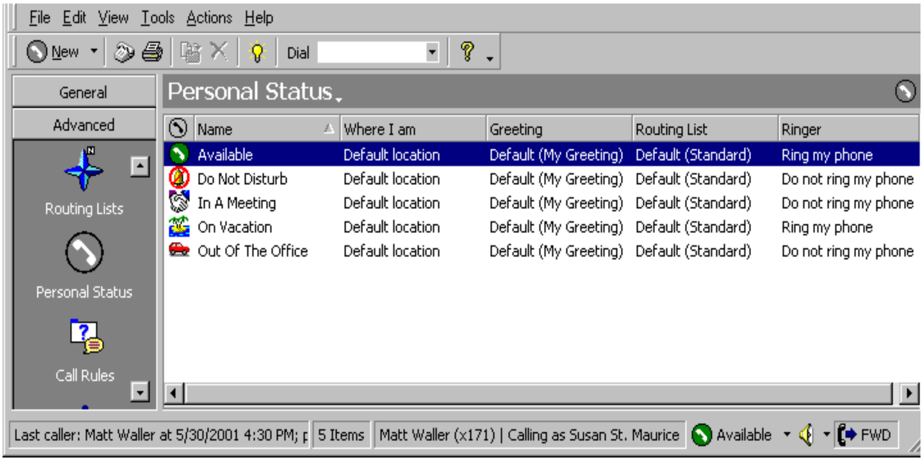
- **Where I Am** specifies the phone at which your incoming calls ring. Changing this setting is equivalent to forwarding your calls. See “Forwarding calls” on page 14-2.
- **Taking calls** determines whether or not your phone rings when calls arrive.
- **Greeting** specifies the voice-mail greeting that Strata CS plays to callers when they reach your voice mail. For more information about greetings, see “Managing greetings” on page 12-15.
- **Routing List** specifies the routing list that Strata CS uses to process calls. For more information about routing lists, see “Using routing lists” on page 14-7.

Example: When you leave the office for an off-site event, you can select the personal status Out of the Office. This predefined Strata CS personal status changes **Where I Am** to forward your calls to a number that you specify. It also changes your **Greeting**, so that callers who reach your voice mail hear a special greeting that you recorded (“I am out of the office this morning. Please leave a message, or you can try me again later, as my calls are forwarded to where I can be reached”).

The Personal Status view

The Personal Status view displays all your personal statuses. Click **Advanced** in the view bar to find the Personal Status view.

Note: You can see the personal status of other users in the Extensions View.



The Personal Status button in the status bar

The status bar shows your current personal status. Click the personal status button in the status bar to select a different personal status. For more information on selecting a personal status, see "Selecting a personal status" on page 8-6.

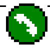
For more information about using the Client's status bar, see "The status bar" on page 7-7.

Using predefined personal statuses

Strata CS includes several predefined personal statuses for your convenience. You can also create custom personal statuses for your own use, for example, Working From Home, At Grandma's House, At Client XYZ, and so forth. See "Creating a custom personal status" on page 8-7.

Personal statuses for all users

The following table lists the predefined personal statuses available to all users.

Icon	Status	Description
	Available	Lets people know that you are available to take calls. All calls ring your phone. You can turn call forwarding on if you want to take calls at a different location, for example, if you are working from home. Call center agents can use this status to sign in. For more call center agent personal statuses, see the next table.
	Do Not Disturb	Lets people know that you are not taking calls. No calls ring your phone. You can record a greeting telling callers you will get back to them later, and you can send your calls directly to voice mail. **Note:** You can create a call rule that overrides the Do Not Disturb personal status, allowing calls from specific people to ring your phone. For more information, see Chapter 16.
	In a Meeting	Lets people know that you are away from your desk. You can record a greeting that tells callers you will be back shortly, and you can specify whether your phone does or does not ring.
	Out of the Office	Lets people know that you are out of the office. You can record a greeting that tells callers when you will return, forward your calls to the extension of someone who is covering your calls, and specify whether your phone does or does not ring.
	On Vacation	Lets people know that you are out of the office for an extended period. You can record a greeting to that effect, forward your calls to a different location or the extension of someone who is covering your calls, and specify whether your phone does or does not ring.

Additional personal statuses for call center agents

In addition to the personal statuses shown in the previous table, the predefined personal statuses shown in the following table are available to agents in a call center queue.

Icon	Status	Description
	Available (Queue Only)	This status or the Available status signs you in at the beginning of your shift. When you select this status, the queue begins sending calls to you. With this status, only queue calls ring your phone. Non-queue calls are sent directly to your voice mail. To have all your calls ring your phone, sign in by selecting the Available status (see the previous table). You can also select this status by picking up the phone and pressing ***51**.
	Available (Non-Queue)	This status signs you out at the end of your shift. When you select this status, the queue stops sending calls to you. With this status, non-queue calls still ring your phone. To prevent all calls from ringing your phone, sign out by selecting Do Not Disturb. You can also select this status by picking up the phone and pressing ***52**.
	On Break	This status puts you on a break during your shift. While this status is selected, the queue does not send calls to you. When you take a break, be sure to use the On Break status rather than Available (Non-Queue), which signs you out of the queue. Using On Break when you take a break will ensure the integrity of call center statistics. You can also select this status by picking up the phone and pressing ***53**.

Icon	Status	Description

Notes:

- You can sign in by selecting either Available or Available (Queue Only).
- You can sign out by selecting any status other than Available, Available (Queue Only), or On Break.

Selecting a personal status

This section explains how to select a personal status:

- In the Client
- On the phone

Selecting a personal status in the Client

Use any of the following methods to select a personal status in the Client:

- Click the Personal Status button on the status bar, and then choose a status.
- Choose **Tools > Personal Status** and then choose a status.
- In the Personal Status view, select a status and then choose **Actions > Set as Active**.

You can configure a particular personal status to automatically open the Active Settings dialog box whenever you select that personal status. Doing this makes it easier for you to change your call forwarding or greeting each time that you select that personal status. For example, you may want to specify a different forwarding number every time you select the "Out of the Office" personal status. For more information, see "Personal status and your active settings" on page 8-10.

Selecting a personal status on the phone

You can select a personal status on the phone in the following ways:

- Log in and press **6 1**. See "Selecting a personal status on the phone" on page 5-7.
- For call center agent statuses, pick up the phone and press ***51** through ***53**. Use these quick commands to sign in and out and go on break. See "Signing in, signing out, and taking breaks" on page 17-3.

Modifying a personal status

You can modify predefined and custom personal statuses to reflect your changing availability and location. For example, if you are often away from your desk attending meetings, you can modify the In a Meeting personal status to send your callers directly to voice mail and play a special “in a meeting” greeting that you record.

The following predefined personal statuses have preferences that you cannot modify.

- **Do Not Disturb.** The **Taking calls** preference is fixed at **No**—the status always sends you calls directly to the final action of your routing list (usually your voice mail) without ringing your phone.
- **Available**. The **Taking calls** preference is fixed at **Yes**—this status always implies that you are ready to take calls.
- **Available and Available (Queue Only) for call center agents.** The **Queue calls** preference is always set to **Yes**. For more information, see Chapter 17.

You cannot delete or rename predefined personal statuses.

To modify a personal status

1. In the Personal Status view, double-click the personal status. The Personal Status dialog box opens.
2. Follow the steps described in the next section, “Creating a custom personal status.”

Creating a custom personal status

You can create custom personal statuses for your own use for any of the following reasons:

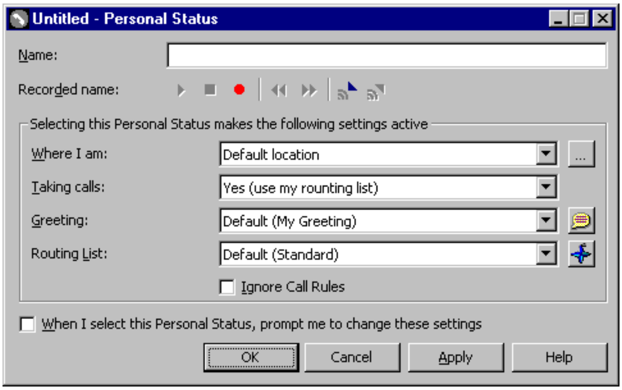
- To provide more information to your colleagues about where you are and what you are doing, for example, Working From Home, At Grandma’s House, At Client XYZ, and so forth.
- To facilitate frequent changes to several call-handling settings at once. For example, whenever you work at the East Side office you might want to forward your calls and change your voice-mail greeting. By creating a custom personal status called East Side Office, you can automatically make both those changes just by selecting the status.

Note: If you are an agent in a call center queue, you cannot create a custom status that accepts queue calls.

Custom personal statuses are identified in the Extensions pane or folder by .

To create a custom personal status

1. Choose **File > New > Personal Status**. The Personal Status dialog box opens.



2. Enter a name for the personal status.

3. Use the audio controls under **Recorded name** to record the name, so that you can select the status by using the telephone commands (see “Selecting a personal status on the phone” on page 5-7).

4. Specify how you want your calls handled while this personal status is selected. For most call handling preferences, you can select either a specific item or **Default**. Selecting Default uses the item that is your current personal status default. Your current personal status default is shown in parentheses when you select Default. See “Personal status defaults” on page 8-12 for more information.

Note: If you change your personal status default, preferences set to **Default** are updated.

- Under **Where I Am**, you can forward your calls to another location by clicking ... and specifying the location. The Call Me at Another Location dialog box opens. This dialog box functions in the same manner as the Place Call To dialog box. For information on how to use this dialog box, see “Placing a call” on page 11-2.
- Select the **Greeting** played to callers when they reach your voice mailbox.
  - To record a new greeting, click .
  - To rerecord a greeting in the list, select it and then press ALT while clicking .

For more information about greetings, see “Managing greetings” on page 12-15.

- If this is a call center personal status, the **Queue Calls** field cannot be modified. If you are not an agent in a call center queue, this field does not appear.
- For **Taking calls**, specify whether you want your telephone to ring or not when a call arrives. When you set this field to **No**, all calls are sent directly to the final action on your routing list (by default, your voice mail).
- Select the **Routing List** that your calls use when you select this personal status.
  - To create a new routing list, click .
  - To edit a routing list in the list, select it, and then press ALT while clicking .

  For more information about routing lists, see “Using routing lists” on page 14-7.
- To make sure that all incoming callers hear the greeting specified here when they reach your voice mail, check **Ignore call rules and use Standard routing list**. Doing this disables your call rules and causes all incoming calls to follow your Standard routing list.

  Note: Checking this box is equivalent to choosing **Tools > Ignore Call Rules** whenever this personal status is in effect.

  With the box unchecked, your call rules might cause some callers to hear greetings or follow routing lists other than the ones specified here.

5. Check the box at the bottom of the dialog box if you want a dialog box to open automatically whenever you select this personal status. Doing this lets you quickly change preferences that you frequently modify.

   Checking this box is helpful to you for those personal statuses whose greetings or forwarding locations you customize on a regular basis. For example, whenever you select the Out of the Office personal status, the dialog box opens and you can specify a different call forwarding location.
6. Click **OK** to save the new personal status.

Personal status and your active settings

When you select a personal status, its preferences are copied to your active settings. Your *active settings* are all the settings that, taken together, determine how Strata CS handles your incoming calls. They are:

- Personal status
- Where I Am (the phone that rings for your incoming calls)
- Active greeting (the greeting played to callers who reach your voice mail)
- Active routing list (the routing list that incoming calls follow)
- Taking calls setting (whether your phone does or does not ring)

Changing your active settings

You can change your active settings in the following ways:

- Change each active setting individually by going to the appropriate view or dialog box. For example, you can set your active greeting in the Greetings view, your active routing list in the Routing Lists view, your Where I Am setting by forwarding your calls, and so forth.
- Change several active settings at once by selecting a personal status. For example, if your On Vacation personal status uses the “I’m on vacation” greeting and specifies that your phone does not ring, whenever you select the On Vacation status, “I’m on vacation” becomes the active greeting and your Taking calls setting is set to No.
- Change active settings directly by using the Active Settings dialog box (see the next section).

Each change you make to an active setting overrides the previous one.

Example: You select the personal status On Vacation, which makes the “I’m on vacation” greeting active. Then you open the Greetings view and make the “Standard” greeting active. The “Standard” greeting is now the active one, even though the On Vacation personal status is still in effect.

Changing your active settings directly

The Active Settings dialog box gives you quick access to all your active settings in one place. Changes you make in this dialog box become your new active settings, and remain active until something else changes them, for example, until you select a new personal status or change the active greeting in the Greetings view.

You can use the Active Settings dialog box in the following ways:

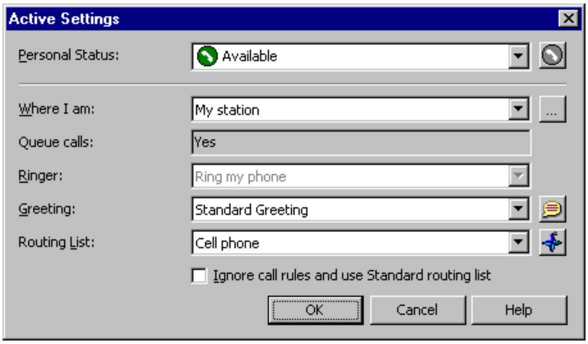
- See at a glance all your current active settings, so that you know how your incoming calls are being handled.
- Set an aspect of a personal status differently whenever you select that status. For example, whenever you select the status Out of the Office, you might want to specify a different call forwarding location. You would select the status, and then specify your call forwarding location in the Active Settings dialog box.

  You can set a personal status to open the Active Settings dialog box whenever you select that personal status so that you can make this kind of change. To do so, edit the personal status as shown in “Modifying a personal status” on page 8-7, and check **When I select this Personal Status, prompt me to change these settings**.

  Note: If you find that you override a personal status preference frequently in the same way, consider changing the preference in the personal status permanently. For example, if you want the Out of the Office personal status to always use your custom routing list that includes your cell phone, specify that routing list in the personal status itself.

To change your active settings directly in the Active Settings dialog box

1. Choose **Tools > Active Settings**. The Active Settings dialog box opens.



2. Change any of the following:
   - To change your current personal status, select a personal status in the drop-down list.
     - To create a new custom personal status, click .
     - To edit the selected personal status in the list, press ALT while clicking .
   - To change the active **Where I Am** phone, **Greeting**, **Taking calls**, or **Routing List** settings, use the instructions in step 4 on page 8-8.

3. To make sure that all incoming callers hear the greeting specified here when they reach your voice mail, check **Ignore call rules and use Standard routing list**. Doing this disables your call rules and causes all incoming calls to follow your Standard routing list. The **Routing List** setting in this dialog box changes to reflect this choice.

   Note: Checking this box is equivalent to choosing **Tools > Ignore Call Rules** whenever this personal status is selected.

   With the box unchecked, your call rules might cause some callers to hear greetings other than the one specified here.

4. When you are done, click **OK**.

5. If the active settings are different then the current personal status, you are prompted to apply these settings as edits to the personal status. Choose one of the following:

   - **Yes.** The active settings go into effect and also are copied to the personal status' preferences. Choose this option if you want to apply these active settings every time you select this personal status.

   - **No.** The active settings go into effect as overrides to the personal status. The personal status remains unchanged. Choose this option to make a one-time change that will not be repeated the next time you select personal status.

Personal status defaults

You can choose default active settings, known as *personal status defaults*. Use these settings to define the normal way you work. As you change your active settings during the day, the personal status defaults function behind the scenes to set everything "back to normal" when you are done with the change.

Example: You set your "Everyday" greeting to be your personal status default, because this is the greeting you normally use. Several times during the day you change your active greeting by selecting the personal status In a Meeting, which applies your custom "Be back soon" greeting. When you return from the meeting and select the personal status Available (or to any other personal status) your personal status defaults are restored, so your "Everyday" greeting becomes active again.

You can choose personal status defaults for the following settings:

- Greeting
- Routing list
- Where I Am (see the next section)

You can change which greeting and which routing list are your personal status defaults at any time. See “Setting personal status defaults” on page 8-13.

Using the Where I Am default

Where I Am specifies the phone that rings when you receive a call. The *Where I Am default* is your station, unless you are forwarding your calls. In that case, it is your call forwarding number. This setting enables you to temporarily override your call forwarding with a personal status, and then restore it.

Example: You forward your calls to your home phone. You then select the custom personal status Lunch Hour, which changes Where I Am to your cell phone. When you come back from lunch you select the personal status Available (or any other personal status), which restores your Where I Am default. Where I Am returns to being your home phone, retaining your call forwarding.

Setting personal status defaults

To designate a greeting or routing list as the personal status default

1. Open the Greetings view or the Routing Lists view and double-click the item that you want to be the personal status default.
2. In the dialog box for that item, check **Default Personal Status Greeting/Routing List**.
3. Click **OK**.

There can be only one personal status default of each type at any one time.

> **Note:** When you change your active greeting by using the telephone commands, it also changes your personal status default greeting.

To set a personal status to use your defaults

1. Edit the personal status. See “Modifying a personal status” on page 8-7.
2. Under **Greeting**, **Routing List**, or **Where I Am**, select **Default**. The drop-down list displays the item that is currently the personal status default in parentheses.

   When you create a new custom personal status, these preferences are already set to Default. The only reason you would need to change them to Default is if you had previously changed them to use specific items.
3. Click **OK**.

Changing the personal status of another user

You can change the personal status of another Strata CS user if you know that user's password. This feature is useful when users want to change their personal status but do not want to log on to Strata CS themselves. For example, a secretary can change the personal status for the boss, or the user who is acting as the Operator user can change the Operator's personal status without logging on as the Operator user.

To change another user's personal status

1. In the Extensions view, right-click the user.
2. Choose **Apply Personal Status** and click a personal status. The Enter Password dialog box opens.

3. Enter the password of the user and click **OK**.

CHAPTER 9

USING THE EXTENSIONS VIEW

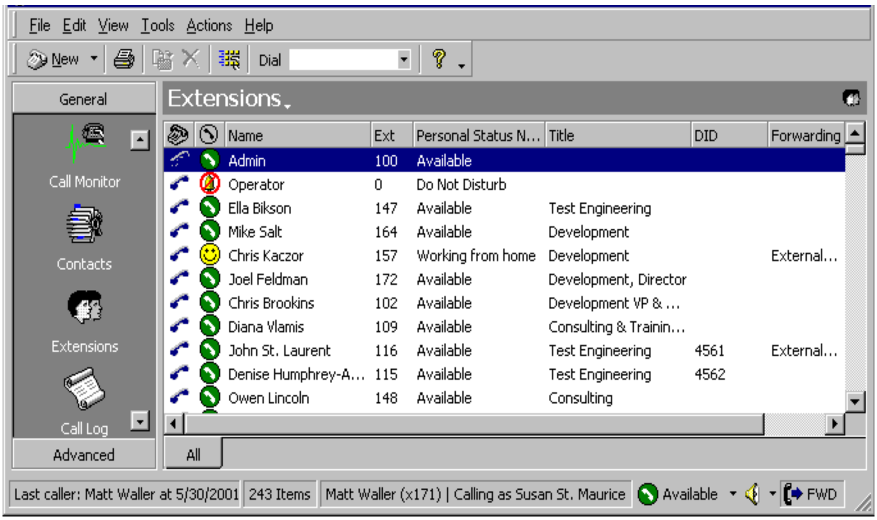
CHAPTER CONTENTS

The Extensions view

The Extensions view lists each Strata CS user and all other Strata CS extensions, with information about the current status of that extension. You can use the Extensions view to quickly place calls to other Strata CS extensions or to change another user's personal status if you have permission to do so.

A glance at the Extensions view can tell you:

- A user's extension
- Whether a user is currently in a call
- A user's current personal status
- Whether a user has call forwarding turned on, and where the calls are forwarded to
- The extension of your office's auto attendants and queues, in case you need to transfer a call there



Extension view tabs

The Extension view contains tabs that display related groups of extensions. Click each tab to view its extensions.

- **All tab.** This tab always appears, and displays all Strata CS extensions.

- **Workgroup tabs.** If you belong to workgroups, the Extensions view contains a tab for each workgroup. Click the tab to see the extensions within that workgroup.
- **Queue tabs.** If you are an agent in call center queues, the Extensions view contains a tab for each queue. Click the tab to see the extensions within that queue.

Extensions view columns

The following table shows the columns that are available in the Extensions view. To show or hide columns, see “Showing and hiding columns” on page 18-11.

Column	Description
	Type of extension or user phone status. The extension types are:  User whose phone is on hook  User whose phone is off hook  Auto attendant  Call center queue  Workgroup  IVR Plug-in
	Icon for the user’s current personal status.
Personal status name	Name of the user’s current personal status.
Ext	Strata CS extension.
Title	Title of the user or other extension type, if available.
DID	Direct Inward Dial number for the extension, if available. You can dial this number from an external phone to reach the extension directly, without going through the auto attendant.
Forwarding	Whether the user has call forwarding turned on. If calls are forwarded to another extension, that extension is shown. If calls are forwarded to an external number, “External Number” is shown.

Placing calls to an extension

To place a call to an extension, double-click the extension. If your phone is on hook, it rings to connect you to the call being placed.

Automatically switching to the Call Monitor view

You can have Strata CS automatically switch to the Call Monitor view when you place a call from the Extensions view. To do so:

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the View tab.
3. Under **Display Call Monitor in the following situations**, check **Placing new calls from Contacts or Extensions**.
4. Click **OK**.

Changing another user's personal status

From the Extensions view you can change another user's personal status if you know that user's password. For instructions, see "Changing the personal status of another user" on page 8-14.

Seeing the Extensions view elsewhere in the Client

The Extensions view appears in the following places in the Client:

- In the Place Call To dialog box, so that you can see it when placing a call from any view. See "Placing a call" on page 11-2.
- In the Transfer To dialog box, so that you can see it when transferring a call. See "Transferring a call" on page 10-9.

In both of these locations, the display does not refresh automatically.

You can also display the Extensions view as a pane in the Call Monitor view, enabling you to place and transfer calls using drag-and-drop operations. See "Adding the Extensions pane to the Call Monitor view" on page 7-10 and "Dragging and dropping items" on page 7-13.

CHAPTER 10

RECEIVING AND HANDLING CALLS IN THE CLIENT

About receiving and handling calls in the Client

In the Strata CS Client, the Call Monitor view is the visual counterpart to your telephone. The Call Monitor lets you see all your incoming calls and any outgoing calls at once, often with the callers identified by name.

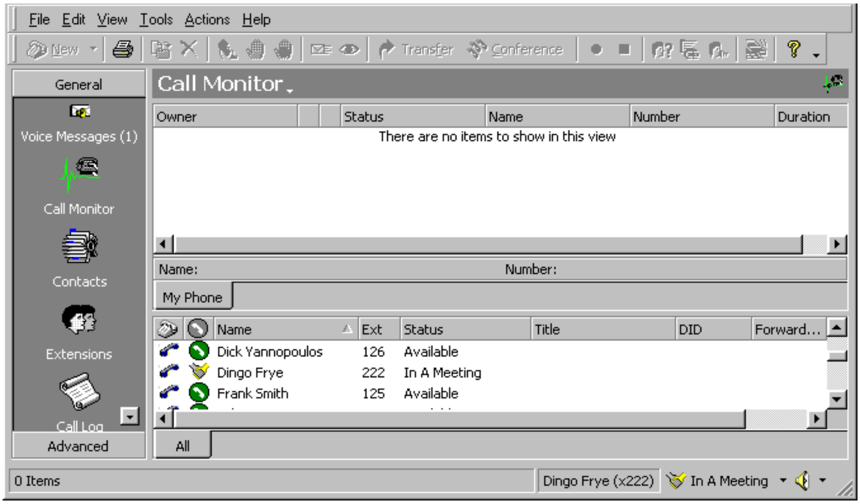
In the Call Monitor view you can:

- See who is calling you and take the call or send it to voice mail
- Click calls to transfer them, put them on hold, send them to voice mail, or perform other actions
- Move among multiple calls on hold with a click of the mouse
- Record calls
- Conference calls (including creating or starting a conference)

This chapter describes the Call Monitor view and then explains the following aspects of handling calls:

- Displaying the Call Monitor automatically
- Selecting and acting on calls
- Using commands while a call is ringing, including taking the call and sending the call to voice mail
- Using commands after a call is connected, including putting calls on hold and transferring calls.
- Using call notification options, including call announcing and call waiting
- Sharing your Call Monitor
- Using the Call Monitor with hands-free answering

The Call Monitor view



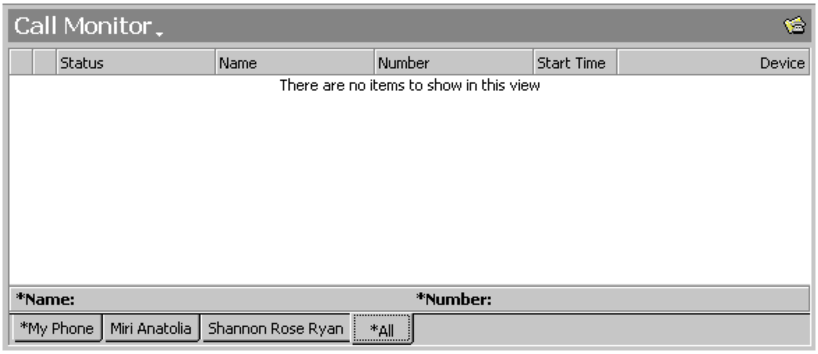
For an explanation of Call Monitor view columns, press **F1** for online Help. For information about changing Call Monitor view columns, see “Customizing columns” on page 18-11.

Note: Based on the current color of a call you can identify the direction it (purple arrow indicates an Outbound call, and a green arrow indicates an Inbound call). When a call is a consultation call (such as Supervised Transfer) you cannot transfer or conference it.

Each row in the Call Monitor view is an item that contains information about one call, or one party in a call. Conference calls appear as a grouped item with each party to the conference call as a separate indented row.

Call Monitor view tabs

The Call Monitor view contains tabs that display call activity. Click each tab to view the related call activity at your phone.



- **My Phone tab.** This tab always appears in your Call Monitor view and displays calls to or from your telephone. This includes calls that are forwarded to your extension (in this case, the called party who forwarded the call is identified in the Owner column), and calls to your DID number if you have one.
- **Queue tab.** If you are an agent in a queue, all the current calls for the queue appear on a separate tab labeled with the queue name. For more information about participating in a queue, see Chapter 17, “Working as a Call Center Agent.”
- **<call owner> tab.** Calls for users who have shared their Call Monitor view with you appear on separate tabs labeled with the call owner’s name. For more information, see “Sharing your Call Monitor view” on page 10-15.
- **Workgroup tab.** If you belong to a workgroup, all current calls for the workgroup appear on a separate tab labeled with the workgroup name. For more information about workgroups, see “Using workgroups” on page 15-13.
- **All tab.** The All tab appears if any other tabs in addition to the My Phone tab appear in your Call Monitor. The All tab allows you to see all calls for all tabs in one place. Calls in the All tab are grouped by the call owner’s name.

Call Monitor view panes

The Call Monitor view contains the following two panes that you can hide or show.

- The Extensions pane, which shows users' availability (personal status) and enables drag-and-drop call handling. See "Adding the Extensions pane to the Call Monitor view" on page 7-10 and "Dragging and dropping items" on page 7-13.
- The Detail pane, which enables you to type and save notes on a call. See "Creating notes about a call" on page 10-13.

Displaying the Call Monitor view automatically

Strata CS can open the Call Monitor view automatically in the following situations:

- When you receive an incoming call
- When you place a call from the Contacts or Extensions view
- When you return a call from the Voice Messages view or the Call Log view

When the Call Monitor view opens automatically, it appears in front of all other open windows on your computer.

To display the Call Monitor view automatically

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the View tab.
3. Under **Display Call Monitor in the following situations**, check one or both of the following options:
   - **Placing new calls from Contacts or Extensions**.
   - **Returning calls from Voice Messages or Call Log**.
4. To display the Call Monitor automatically on incoming calls, click the Incoming Calls tab and check **Display the Call Monitor**.
5. Click **OK**.

Selecting and acting on a call in the Call Monitor view

Click a call in the Call Monitor view to select it. After it is selected, you can choose commands to apply to that call.

To use a command on a call in the Call Monitor view, do one of the following actions:

- Right-click the call and choose a command on the shortcut menu. This option is often the fastest way of choosing a command, but it may be

difficult to do so during times when phone traffic is heavy. This is due to the fact that calls change position in the Call Monitor view as new calls arrive and transferred calls leave the Call Monitor view.

- Click a toolbar button.
- Choose the command on the **Actions** menu.

Double-clicking calls

Double-clicking in the Call Monitor view has the following effects:

- Double-clicking an active call puts it on hold.
- Double-clicking any other type of call takes the call (connects you to the caller). This includes incoming calls, calls on hold, parked calls, or calls for which you are screening a message.

Commands while a call is ringing

While calls are ringing at your phone, the Call Monitor view displays “Incoming Call.” If Strata CS can identify the caller, the item in the Call Monitor view also displays the caller’s phone number and name, enabling you to screen your calls. (see “You can teach Strata CS to recognize contacts when they call.” on page 15-8). While calls are ringing, you can perform the following actions:

- Take the call
- Send the call to voice mail
- Put the call on hold without talking to the caller first (also known as grab-and-hold)
- Transfer the call without talking to the caller first

Taking the call

If you are already on another call, select the incoming call and choose **Actions > Take Call**. Your current call is put on hold. You can easily move among multiple calls by choosing **Take Call** again.

When you use **Take Call** in the Call Monitor view, call announcing is not available. However, you can play the caller’s name over your speakers by choosing **Actions > Announce Caller**. To have incoming callers’ names played over your speakers automatically, see “Other options for incoming calls” on page 10-14.

Sending the call to voice mail

Select the call, and then choose **Actions > Take Message**. The call is sent to your voice mail.

Note: Call center agents cannot perform this command on an incoming queue call.

You can listen to a voice message as the caller is leaving it and pick up the call if needed.

To listen to a voice message as it is being left

1. Select the call while it is ringing or while the caller is leaving a message.
2. Choose **Actions > Screen Message**.
3. Pick up your phone and listen to the message as it is being left. This is a one-way connection. The caller cannot hear you.
4. To interrupt the message and take the call, choose **Actions > Take Call**. You are connected to the caller.

Using grab-and-hold on the call

Use grab-and-hold when you are momentarily unable to take an incoming call but intend to speak to the caller soon. Grab-and-hold puts callers on hold without your talking to them first and plays a special grab-and-hold greeting that you have recorded. (See "To record a grab-and-hold greeting" in this section.) Callers can wait on hold or leave a voice message. The Status column shows their choices.

Strata CS supplies you with an initial grab-and-hold greeting that says, "The person you are trying to reach is on another call. To hold for your party, remain on the line. Otherwise, to leave a message, press 1. To end this call, press 2". The caller can also press 0 to transfer to the Operator, though this option is not mentioned in the prompt.

You can rerecord this greeting to say, for example, "This is Angela. I am on another call right now, but if you hold for a moment I will be right with you." The options that callers hear with this greeting are contained in a separate prompt that only your Strata CS system administrator can change.

To use grab-and-hold on a call

Select the incoming call, and choose **Actions > Hold**.

To record a grab-and-hold greeting

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the Incoming Calls tab.
3. Use the audio controls under **Play this greeting when an incoming call is placed on hold** to record a grab-and-hold greeting.
4. When you have recorded your grab-and-hold greeting, click **OK**.

Transferring a call without talking to the caller first

See “Transferring a call” on page 10-9.

Commands after you answer a call

After you answer a call, you can perform actions on that call, including the following. Procedures for each of these tasks appear in the remainder of this section.

- Putting a call on hold
- Transferring a call
- Recording a call
- Associating a call with a contact
- Parking a call
- Unparking a call
- Muting a call
- Playing a caller’s name
- Disconnecting a call while staying on the phone
- Creating notes about a call in the Details pane at the bottom of the view

Putting a call on hold

To put a call on hold, select the call, and then choose **Actions > Hold**.

You can put as many calls on hold at one time as you want. The **Duration** column shows how long each call has been waiting on hold.

Notes:

- Use **Actions > Hold** instead of the Hold button on your phone. When on hold, callers hear music (if your system has music on hold), but they hear only silence if you use your phone’s Hold button.
- You cannot put a call to a queue, auto attendant, or IVR Plug-in on hold. If you do, the call is disconnected.

Callback for calls on hold

By default, if you hang up with one or more calls on hold, Strata CS rings your phone to remind you. If you do not pick up the phone, any calls on hold are sent to voice mail.

You can choose how long Strata CS waits before ringing your phone. You can also turn ringback off. See “Turning callback for calls on hold on and off” on page 18-6.

Callback is not available when working at a remote phone.

Transferring a call

The Call Monitor view allows you to easily transfer a call to any party, either another Strata CS user or someone at an external phone number. You can look up users and contacts by name, and you can see in advance if an extension is busy. You can even transfer a call to an auto attendant or to a user's voice mail.

Drag-and-drop transferring

With the Extensions pane showing in the Call Monitor view, you can drag a call from the Call Monitor to an extension in the Extensions pane to transfer the call to that extension. For more information on drag-and-drop commands, see "Dragging and dropping items" on page 7-13.

Blind vs. supervised transfers

You can transfer a call in one of the following ways:

- **Blind transfer,** sometimes called an unattended transfer. You transfer the call without first speaking to the recipient. When the recipient answers the phone, the call is connected.

  Note: If you transfer a call without answering it, you are performing a blind transfer.

- **Supervised transfer,** sometimes called an attended transfer. You ask the recipient to accept the call, and then you transfer the call if the recipient agrees, or you send the call to the recipient's voice mail if the intended recipient does not agree to take the call.

To transfer a call

1. Select the call that you want to transfer.
2. Choose **Actions > Transfer**. The Transfer To dialog box opens.
3. Select the person or enter the number to which to you want to transfer the call. See "Placing a call" on page 11-2 for instructions.

   Note: You may be prohibited from transferring an external caller to an external number. See your Strata CS system administrator for more information.

4. If you are transferring the call to an external number, select the dialing service to use on the **Call Using** drop-down list. See "Using dialing services" on page 11-4.

5. If you are transferring the call to a user or a contact, choose a blind or supervised transfer. (See “Blind vs. supervised transfers” on page 10-9 and in the next step).

6. If you selected **Blind transfer**, click **OK**. The transfer is completed and the call disappears from your Call Monitor.

   If you selected **Supervised transfer**, go to the next step in this procedure.

7. Click **OK**. You are connected to the recipient’s extension, and the caller is put on hold. The incomplete transfer displays as a linked three-party call in the Call Monitor.

8. Speak to the recipient and announce the caller. A dialog box opens and asks you if you want to complete the transfer or cancel it.

9. Choose one of the following options:

   - **Complete.** The transfer is completed and the call disappears from your Call Monitor. You can also complete the transfer by hanging up the phone.
   - **Conference.** You, the caller, and the recipient are all connected in a conference call.
   - **Cancel.** The transfer process ends and you are reconnected to the caller.

Transfer tips for Operator users

By using workgroups and showing the Extensions pane in the Call Monitor view, you can easily find and choose the recipient of a call that you want to transfer. Define workgroups to represent the departments of your office. When transferring a call you can then view only the members of a workgroup, for example, the Marketing workgroup. You can see at a glance the names of members of the Marketing department and who is available to take a call. See “Using workgroups” on page 15-13 and “Adding the Extensions pane to the Call Monitor view” on page 7-10.

You can also transfer calls more easily by resizing the Transfer To dialog box, showing and hiding columns, and sorting by column. See “Customizing the Client for Operators” on page 18-10.

Recording a call

If your Strata CS system administrator has given you the required permission, you can record your Strata CS conversations, including conference calls. By default, recordings appear in the Inbox folder of your Voice Messages view, although your Strata CS system administrator may have set them to appear in another person's Voice Messages view. Recorded conversations are stored in the limited space that you have been allocated for all of your voice files.

The maximum length of a single recording is equal to the total number of minutes available in your voice mailbox. By default this is 20 minutes, but your Strata CS administrator may have set a different limit.

Important: It is possible for a recorded conversation to "over fill" your voice mailbox. The recording will not be cut off. However, you cannot receive more voice messages when your voice mailbox is full. For this reason, you must check your available mailbox space after recording any conversation to be sure that you have space for new voice messages. See "Viewing your voice mailbox size" on page 12-15 for more information.

To record a call

1. During an active call, choose **Actions > Start Recording**. Strata CS starts to record the call.
2. To stop recording, choose **Actions > Stop Recording**.

To play a call you just recorded

In the Voice Messages view, click the Inbox folder, or open another mailbox if your system is set up differently. Select the recording, and then choose **Actions > Play**.

If the recordings are in your own Inbox folder, you can listen to them by using the telephone commands. See "Listening to your voice messages" on page 5-3 for more information.

Associating a call with a contact

Unidentified calls appear in the Call Monitor view as being from "Unknown." You can associate a particular unidentified call with one of your contacts, so that the Call Monitor and Call Log views display a name with the call. You can also permanently associate the call's Caller ID phone number or text with the contact, so that Strata CS automatically identifies the contact on all subsequent calls from that phone.

To associate a call with a contact, choose **Actions > Associate**. See "Associating a call or caller ID number with a contact" on page 15-10.

Parking a call

Parking a call puts a call on hold and lets any Strata CS user retrieve it from any Strata CS telephone or Client program in your office.

To park a call

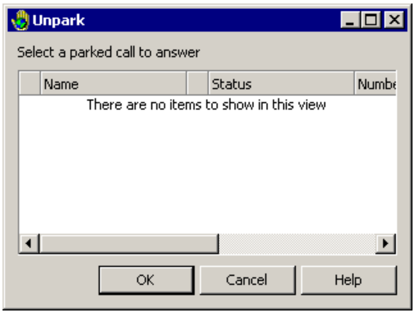
1. In the Call Monitor, select the call you want to park.
2. Choose **Actions > Park**. The **Status** column in the Call Monitor view displays “Parked on <orbit number>.

Unparking a call

You can retrieve a call that was put on hold by a Strata CS user from any Strata CS telephone or Client program in your office.

To answer a parked call from any Client program

1. Click **Tools > Unpark**. The Unpark dialog box opens.



2. Select the call that you want to answer and click **OK**.

You also can answer the call by picking up a Strata CS phone, pressing ***92**, and then entering the orbit number.

If no one answers the parked call

By default, if no one answers a call that you parked, Strata CS rings your phone to connect you to the caller. If you do not answer, the callback is repeated periodically until either you answer or someone else answers the call.

Note: Strata CS never sends a parked call to voice mail. If you do not answer the callback, it continues to try to reach you indefinitely.

You can choose how long Strata CS waits before ringing your phone for callback of parked calls. You can also turn callback off. See “Turning callback for calls on hold on and off” on page 18-6.

Callback is not available when working at a remote phone.

Muting a call

With Strata CS you can mute a call even if your phone does not have a mute button. When muted, you can hear the caller, but the caller cannot hear you.

To mute a call, choose **Actions > Mute**. Choose **Actions > Mute** again to turn muting off.

Playing a caller's name

You can play a recording of a caller's name over your speakers at any time during a call by choosing **Actions > Announce Caller**.

The recording that plays is either the caller's voice title, if one has been recorded, or the caller's answer to the call announcing prompt, "Please say your name." If you choose **Actions > Announce Caller** and a name does not play, one or more of the following conditions are present: the caller has no voice title recorded, you have the call announcing prompt turned off, or the caller did not answer the prompt.

See "Customizing or turning off call announcing" on page 18-3 for more information about call announcing. See "Recording your voice title" on page 2-2 for more information about voice titles.

You also can have the caller's name play automatically when an incoming call arrives. See "Other options for incoming calls" on page 10-14.

Disconnecting a call while staying on the phone

You can hang up on a call without hanging up the phone. Select the call, and then choose **Actions > Disconnect**. This command disconnects the caller and provides you with a dial tone. This command is useful if.

- You want to disconnect a single party in a conference call. Hanging up your phone would disconnect you from the whole conference.
- You are going to immediately dial another call. If you hang up and pick up the phone too quickly, Strata CS can read that as a Flash command, which would put the call on hold instead of disconnecting it.

Creating notes about a call

While a call is visible in your Call Monitor view, you can create notes about the call in the Detail pane. If the Detail pane is not showing, choose **View > Detail Pane**.

If the call is transferred to someone else, notes that you created about the call are sent with the call (for example, you can add a note such as “Customer wants to track invoice #123987” before transferring the call to your shipping department). When the call is complete, you can view or edit the notes for the call in the Call Log view (see Chapter 13, “Using the Call Log View”).

Call notification options

When you receive a call, the “ringing bell” button appears in the system tray on your Windows taskbar. Hold the mouse pointer over the button to see who is calling by phone number and name, if available:

Right-click the button for a shortcut menu of call-handling commands such as **Take Call** and **Take Message**. Double-click the button to bring the Client to the front of your desktop.

Strata CS can also give you information about an incoming call on the phone, in the following ways:

- **Call announcing.** Strata CS announces the caller’s name and gives you the choice of accepting the call or sending it to voice mail. See “Call announcing” on page 4-2 and “Customizing or turning off call announcing” on page 18-3 for more information.
- **Call waiting.** When you are on a call, Strata CS alerts you of an incoming call by playing the call waiting tone (two beeps). See “Call waiting” on page 4-3 for more information.
- **Caller ID display.** If you have a telephone with a caller ID display, you can use it to see the caller ID of the incoming call.
- **Customized ring patterns.** See the next section.

Customized ring patterns

You can set ring patterns for incoming calls of a particular category or type. The type of ring then allows you to quickly identify the type of incoming call. For example, you can use one ring for internal callers and two rings for external callers. For instructions, see “Changing ring patterns” on page 18-7.

Other options for incoming calls

The Incoming Calls tab of the Options dialog box offers you other ways Strata CS can signal an incoming call. See “Customizing incoming call behavior” on page 18-9 for more information.

Sharing your Call Monitor view

You can share your calls with other Strata CS users. Those users see your calls when they click on a tab with your name on it in their Call Monitors.

When you share calls with another user, your calls still appear in your own Call Monitor. However, if that user accepts one of your shared calls, you cannot accept it also.

Note: Calls that you share with another user do not ring at the other user's telephone. If you want your calls to ring for the other user, forward your calls to the user instead of sharing them. For more information about call forwarding, see Chapter 14.

You can use call sharing in the following ways:

- Your officemate can cover your calls when you step away from your desk.
- Your assistant can screen all your calls and pick up routine calls while letting important calls go through to you directly.

Example: A vice president shares calls with an assistant so that the assistant can monitor all calls. Based on the caller's identity, the assistant lets some calls go through, answers other calls, and sends some calls directly to the executive's voice mail. If another call arrives while the executive is already on a call, the assistant can see with whom the executive is talking, determine if the current call is too sensitive to be interrupted, and handle the call appropriately.

For instructions on sharing your Call Monitor, see "Sharing views and folders" on page 7-19.

Viewing shared calls

When users share their Call Monitor views with you, the following tabs appear in your Call Monitor:

- A <call owner name> tab for each user who has shared calls with you. This tab displays only the calls for that user
- The All tab, which displays all shared calls. The calls are organized by call owner name.

See "Call Monitor view tabs" on page 10-4 for information about how tabs are used in the Call Monitor to display calls.

Using the Call Monitor view with hands-free answering

You can use all Call Monitor view commands and features with hands-free answering. For an overview of hands-free answering, see "Using hands-free answering" on page 4-9.

Enabling and disabling hands-free answering in the Client

1. On the main menu, click **Tools > Options**. The Options dialog box opens.
2. Click the Phone tab.
3. Select the **Enable hands-free answering** check box. Clear the check box to turn hands-free answering off.
4. Enter the desired time in the **Dial tone time-out seconds**. This setting identifies how long a dial tone plays after the end of a call before the station reverts to silence waiting for the next call. A setting of 0 indicates no dial tone, in which case the station reverts to silence as soon as a call ends.
5. Click **OK**.

Using the Call Monitor view with voice-first answering

You can use all Call Monitor view commands and features with voice-first answering. For an overview of voice-first answering, see “Using voice-first answering” on page 4-10.

Enabling and disabling voice-first answering in the Client

1. On the main menu, click **Tools > Options**. The Options dialog box opens.
2. Click the Phone tab.
3. Select the **Enable voice-first answering** check box. Clear the check box to turn voice-first answering off.
4. Click **OK**.

Note: Voice-first answering will not work when hands-free answering is also enabled.

CHAPTER 11

PLACING CALLS IN THE CLIENT

CHAPTER CONTENTS

About Placing Calls in the Client

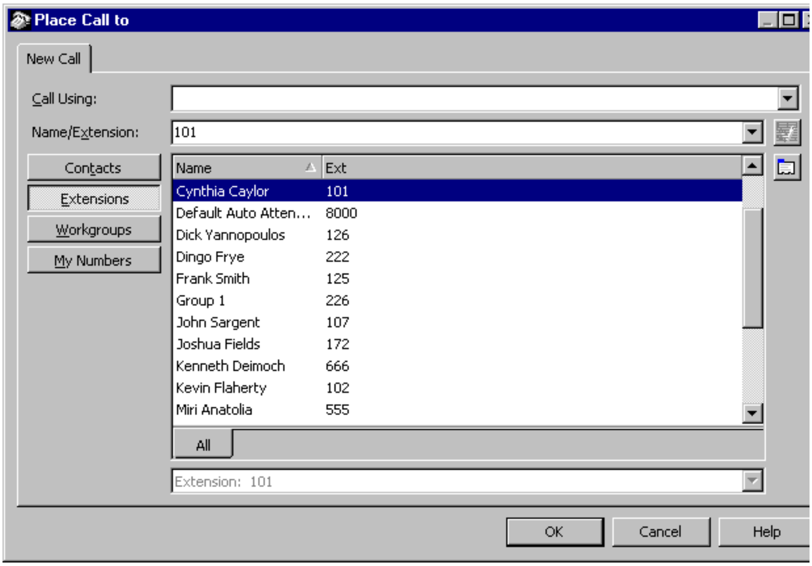
You can place calls in any Client view. You can place calls with the phone either on-hook or off-hook. If the phone is on-hook when you place a call, your phone rings immediately after you finish dialing the number. If the phone is off-hook when you place a call, you hear Strata CS dialing the number.

This chapter explains the following aspects of placing calls in the Client:

- Placing calls, including using other contact managers and placing calls to workgroups
- Using dialing services, including how to enter a phone number and how to enter an Internet address when you are calling a remote H.323 device or a Strata CS Server
- Redialing numbers and returning calls
- Displaying the Call Monitor when you place a call
- Creating speed dial shortcuts
- Creating conference calls

Placing a call

1. Choose **File > New > Call**. The Place Call To dialog box opens.



2. Do one of the following:

- Click **Contacts** and select a contact on the list.

  The contact's default phone number appears in the drop-down list below the list. If the contact has more than one phone number associated with it, you can select a different number to call on the drop-down list.

  To create a new contact now, click to open a new Contact dialog box. To edit the currently selected contact, press ALT and click . See "Entering a new contact" on page 15-4 for more information.

- Click **Extensions** and select an extension on the list. You can select a user, queue, auto attendant, or IVR Plug-in.
- Click **Workgroups** and select a workgroup with an extension on the list.

  When you call a workgroup, all Strata CS phones within that workgroup ring simultaneously. The first member of the workgroup to pick up the phone connects to the call. Contacts in the workgroup are ignored.

- Click **My Numbers**. To place a call to one of your own phone numbers, such as your home or mobile phone, select it on the list. To place a call to another number, enter the number in the **Number** field.

  Note: To verify that the phone number is entered in a correct format, click .

3. If you are placing a call to an external number, select the appropriate dialing service on the **Call Using** drop-down list (see the section "Using dialing services" in this chapter).
4. Click **OK** to place the call.

Another way to place a call to a user is to double-click the user in the Extensions view (or in the Extensions pane).

Placing calls by using the toolbar Dial field

The Client toolbar includes a **Dial** field that you can use to place calls.

To place a call using the toolbar Dial field, do the following:

1. Type either of the following in the **Dial** field:
   - The number to dial. If it is an external number, type the full number that you would dial on the phone, including the access code. You can type hyphens as part of the number.
   - The full name of a user or contact.
2. Press ENTER to place the call. If your phone is on-hook, it rings to connect you to the call being placed.

Click the arrow next to the **Dial** field for the most recent numbers you dialed.

Placing calls by using other contact managers

You can place calls by using other contact managers such as Microsoft Outlook, Act!, and GoldMine. For more information, see “Using the TAPI Service Provider and the CMA” on page 1-3.

Using dialing services

When you place an outbound call, you must enter a number for a dialing service before you dial the phone number. Your Strata CS system administrator typically sets up dialing services with names like “Phone number” or “Chicago Centrex” with access codes of 9 or 8 so that it is easy for you to remember the appropriate dialing service to use when you place a call.

For example, to call an external phone number, you could do one of the following:

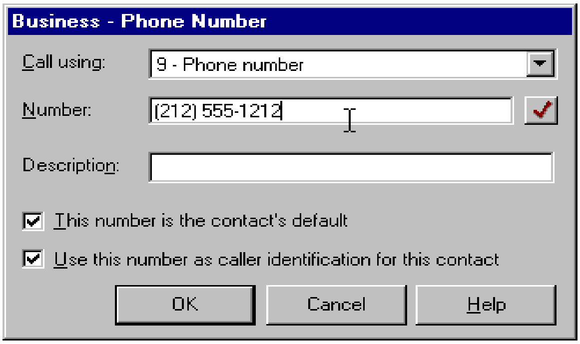
- Select the dialing service “Phone number” on the **Call using** drop-down list in the Place Call To dialog box in the Client, choose the phone number that you want to dial on the list, and click **OK**.
- Dial the access code “9” on your telephone and then dial the phone number.

The dialing services available to you depend on how your system is set up. Your Strata CS system administrator can tell you how to choose the appropriate dialing service for the following types of calls:

- Local or long-distance calls over a T1 line
- Calls to a PBX or Centrex extension
- Calls to a user on another Strata CS system through an Internet connection
- Calls to the Internet address of an H.323 terminal such as Microsoft NetMeeting

Entering a phone number by using a dialing service

Whenever the Client opens the Phone Number dialog box and prompts you to enter a phone number, you must first select the dialing service to use.



To enter a phone number by using a dialing service

1. In the **Call Using** field of the Phone Number dialog box, select the dialing service to use. Ask your Strata CS system administrator about the different dialing services available in your system.
2. In the **Number** field, enter a phone number, Internet address, or Centrex or PBX extension (see the next three procedures for detailed instructions).

To enter a phone number

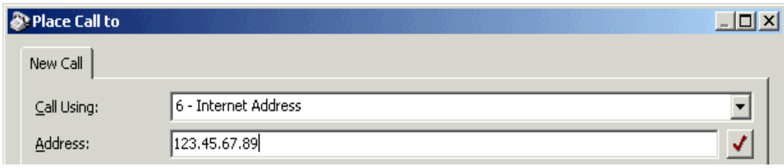
1. In the **Number** field, enter the phone number.
   - For local calls, you might not need to enter the city or area code. Strata CS will automatically dial the number correctly. You do not need to enter the long-distance prefix as part of a long-distance number.
   - To enter a phone number for international dialing, enter the country code followed by the phone number, for example, 44-987-654-3210. You do not need to enter the international dialing prefix as part of an international number.Click **OK**.

To enter an IP address

1. In the **Address** field, enter the IP address of the remote H.323 device or Strata CS Server to which you want to connect. For example, 123.45.67.89 or abccorp.com.
   - If the IP address connects you to a remote Strata CS Server, you can dial a user on that system by appending the appropriate Direct Inward

Dial (DID) digits, if they exist. Separate the address from the DID digits by a slash, for example, 123.45.67.89/2717.

- You can append only DID digits to an IP address, not a user's extension.



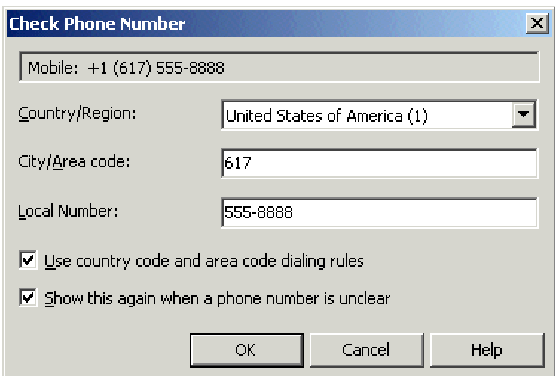
2. Click **OK**.

To enter a Centrex or a PBX extension

1. In the **Extension** field, enter the Centrex or PBX extension to call.
2. Click **OK**. In many cases Strata CS begins to dial the number when you close this dialog box.

Checking a phone number

To confirm that Strata CS has correctly interpreted a complex phone number or address that you have entered—for example, that it has recognized the correct country on an international call—click ✓ next to the **Number** or **Address** field. The Check Phone Number dialog box opens. You can correct any dialing errors here before you place the call.



To check a phone number

1. Check **Use country code and area code dialing rules** if you want Strata CS to apply dialing rules that determine if a number is a local or

long-distance call. Uncheck it to have Strata CS dial the number exactly as entered, as if you had dialed it on the phone.

2. Click **OK** to close the Check Phone Number dialog box.

Redialing numbers and returning calls

You can quickly perform the following dialing actions in the Client:

- **Redial the last number you dialed.** Press **F12** on your computer keyboard.
- **Return the last call you received.** Press **F11** on your computer keyboard. The name of the last caller and the phone number appear in the status bar at the bottom of the Client window.
- **View your last 4 calls.** Click the **File** menu and select the call you want.

You can also redial and return calls by using the phone. See “Placing calls with * options” on page 3-5.

Displaying the Call Monitor when you place a call

Strata CS can display the Call Monitor automatically when you place a call from the Contacts view or the Extensions view. It can also automatically switch to the Call Monitor when you return a call from the Call Log view or the Inbox folder of the Voice Messages view. See “Displaying the Call Monitor view automatically” on page 10-5 for details.

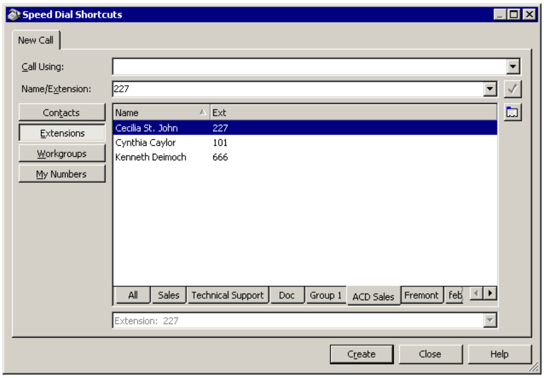
Creating speed dial shortcuts

Speed dial shortcuts are Windows shortcuts for phone numbers that you dial frequently. Speed dial shortcuts appear as icons on your Windows desktop. You can drag them to your Microsoft shortcut toolbar or to any directory. Double-clicking them will call the phone number and launch the Client if it is not already started.

To create a speed dial shortcut

Right-click a call, an extension, or a contact and choose **Create Speed Dial Shortcut** to automatically create a speed dial shortcut. You can also use the next procedure to create a speed dial shortcut.

1. Choose **Tools > Speed Dial Shortcuts**. The Speed Dial Shortcuts dialog box opens.



2. Enter a phone number for the shortcut or click **Contacts**, **Extensions**, **Workgroups**, or **My Numbers** and choose the appropriate number from the list.

   Note: You cannot make a shortcut for a workgroup unless your Strata CS system administrator has given it an extension.

3. Click **Create**. A dialog box opens and confirms that the shortcut has been added to your desktop.

4. Repeat steps 2 through 3 to create other speed dial shortcuts or click **Close**.

Working with conference calls

Strata CS lets you conference up to seven calls together. This total number includes the user who creates the conference call. The Call Monitor view treats a conference call as a single call. You can put a conference on hold or park it exactly as you would a single call.

Conference calls appear in a tree structure in the Call Monitor view. Participants appear on indented rows under the conference call. Click the top row to perform an action on the conference.

You can create a conference call by:

- Adding a new party into the conference
- Conferencing two separate calls together

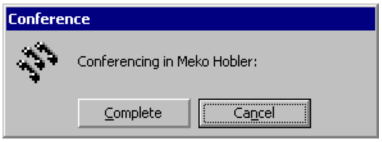
Adding a party to a conference

Use this procedure to start and build a conference call. The call is placed on hold while you are adding new parties, but the parties already conferenced can continue to talk to each other.

1. Dial the first party and wait for an answer.
2. Click the call in the Call Monitor view.
3. Choose **Actions > Conference**. The Conference dialog box opens.
4. Select the second party for the conference call or enter a phone number to dial, and then click **OK**. See “Placing a call” on page 11-2 for more information.

   Note: If you have more than one active call when you choose the Conference command, click the New Call tab in the Conference dialog box to place the call.

   When the call is answered, you are connected to the new party in a separate call. The Conferencing dialog box opens giving you the option of adding the party to the conference or not.

5. Determine whether you want to add the new party to the conference. Then click one of the following:
   - **Complete.** The new party is added to the conference call.
   - **Cancel.** The new party’s call is disconnected, and you return to the conference call.
6. Repeat steps 2-5 to add more parties to the conference.

Important:

- No more than 7 parties can participate in a conference call,
- You cannot conference two conference calls together.

To add parties to a conference by dragging and dropping

To drag-and-drop parties into a conference, you must have either the Calls pane open in the Extensions or Contacts view, or the Extensions pane open in the Call Monitor view. For more information, see “Adding the Calls pane to any open view” on page 7-9 and “Adding the Extensions pane to the Call Monitor view” on page 7-10 for instructions.

Drag and drop parties as follows:

- Using the Extensions pane in the Call Monitor view, you can create a conference call by pressing SHIFT and dragging and dropping a call or an extension onto another call.
- Using the Calls pane in any view, you can a drag an item—for example, a contact—onto the active call in the Calls pane to automatically add the contact as a party to the conference. If you press SHIFT while you drag a user, the Conference dialog box opens and provides further options.

For other drag-and-drop operations you can perform in the Client, see “Dragging and dropping items” on page 7-13.

Conferencing separate calls together

Use the following procedure when you have two or more separate calls that you want to conference together with yourself. You cannot conference two conference calls together.

To conference separate calls together

1. Select one of the calls that you want to join into a conference call. It does not matter which call you choose.
2. Choose **Actions > Conference**. The Conference dialog box opens.
3. On the Existing Calls tab, select the other call that you want to place into the conference call.
4. Click **OK**.
5. Repeat steps 1-4 if you want to add other existing calls to the conference.

Transferring a conference call

You cannot directly transfer a conference call. You can, however, add a new party to the conference and then leave the conference.

Using Hold and Disconnect on external callers

You can put individuals in a conference call on hold, or disconnect them, but only if they are external callers. You cannot place users on hold or disconnect them.

To place an external call on hold or disconnect:

1. Select the external caller in the Call Monitor or the Calls pane.
2. Choose **Actions > Hold** or **Actions > Disconnect**.

Ending a conference call

A conference call normally ends with all parties hanging up at roughly the same time. If you leave the conference call early, however, keep in mind that the conference continues without you. The other participants can continue to talk, even if you started the conference and your company is paying for the outgoing calls used to create it. To terminate the call, each participant must hang up, or you must disconnect all parties.

CHAPTER 12

WORKING WITH VOICE MESSAGES IN THE CLIENT

CHAPTER CONTENTS

About working with voice messages in the Client

You can manage your voice messages in the Strata CS Client in the same way that you manage e-mail messages in your e-mail program. Your new voice messages appear in a list in the Inbox folder of the Voice Messages view according to the time and the caller. You can listen to them in any order you want, and you can easily forward them, reply to them, or archive them in other folders that you create.

This chapter describes the Voice Messages view and then explains the following aspects of working with voice messages in the Client:

- Knowing when you have new messages
- Listening to your voice messages
- Handling your voice messages
- Organizing voice messages in folders
- Sharing your voice messages
- Viewing your voice mailbox size
- Managing greetings in the Greetings view

For instructions on how to listen to voice messages by using the Telephone Commands, see Chapter 5.

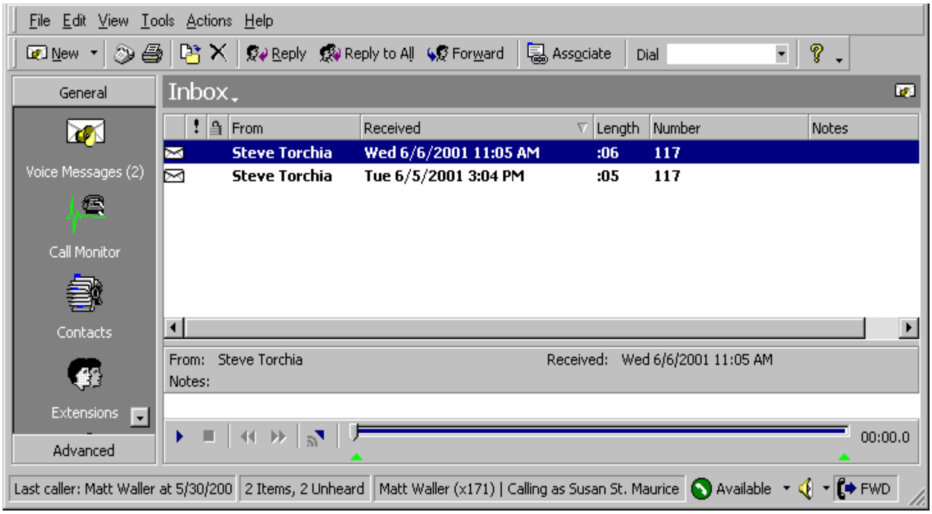
The Voice Messages view

The Voice Messages view contains your voice messages. It contains two predefined folders:

- **The Inbox.** New voice messages appear here. After you listen to them, they remain here unless you move or delete them.
- **The Saved folder.** Saved messages appear here. When you save a message by using the telephone commands, it moves to the Saved folder.

You can create as many custom folders as you want for storing voice messages. See “Using the Folder List” on page 7-16 for instructions on how to move voice messages between folders.

Audio controls for playing your voice messages appear in the audio bar above the system tray. When you play a message, the audio bar shows elapsed message playback time in minutes and seconds.



Note the following display attributes of items in the Voice Messages view:

- **Bold text** indicates a new (unheard) message.
- **FW:** in the From column indicates a message that was forwarded to you.
- **RE:** in the From column indicates a message that was sent to you in reply to another message.

Knowing when you have new messages

New voice messages appear in the Inbox folder of the Voice Messages view very soon after they are left. Strata CS uses the following indicators to let you know that you have new voice messages:

- System tray button
- Stutter dial tone
- Message-waiting light (if supported by your phone)
- New message tone
- E-mail and pager notifications

System tray button

If the Client is running, the following button appears in the system tray at the lower right corner of your Windows taskbar when a new message arrives:

Hold the mouse pointer over the button to see the number of new (unheard) voice messages.

Double-click the button to bring the Client program to the front of your Windows desktop.

Stutter dial tone

A dial tone that begins with a stutter indicates that you have unheard voice messages.

New message tone

Strata CS can play a sound whenever a new voice message is received.

To enable the new message tone

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the Voice Messages tab.
3. Check **Play a sound when a new message arrives**.
4. Click **OK**.

E-mail and pager notifications

Strata CS can send an e-mail message to you or page you whenever you receive a new voice message. This feature is handy if you are working at a remote location at which the Client program is not available. You can then call your office and hear your messages.

You can receive notification for all voice messages, or for Urgent messages only, by using the following methods:

- **E-mail:** The e-mail message includes the caller's name (if identified), the phone number at which the call originated, the extension at which the message was left, the message length and any notes associated with the message. You can even have Strata CS attach the voice message itself to the e-mail as an audio file so that you can play it wherever you are.
- **Pager:** You can set pager notifications to include the caller ID of the voice message, the Strata CS extension that the caller dialed, and the length of the voice message.

Important: For e-mail notification to work properly, the Strata CS Server must be configured correctly. See your Strata CS system administrator if you encounter any problems.

To receive e-mail notification

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the Notification tab.
3. Select one of the following notification options on the drop-down list:
   - **Do not send e-mail notifications.** You do not receive e-mail notification of new voice messages.
   - **Send e-mail for all messages.** You receive an e-mail notification whenever you receive a new voice message.
   - **Send e-mail for urgent messages only.** You receive an e-mail notification whenever you receive a voice message marked Urgent.
4. In the **E-mail address(es)** field, type one or more e-mail addresses to which you want Strata CS to send notifications. Separate addresses by semicolons.
5. To instruct Strata CS to attach the voice message to the e-mail as a .WAV file, select one of the following options on the drop-down list:
   - **Do not attach voice message.** Messages are not attached to the e-mail.
   - **Attach voice message.** Messages are attached to the e-mail and also appear in the Inbox folder of the Voice Messages view marked as new (unheard).
   - **Attach voice message and mark as heard.** Messages are attached to the e-mail and appear in the Inbox folder of the Voice Messages view marked as old (heard).
   - **Attach voice message and delete from Inbox.** Messages are attached to the e-mail only and do not appear in the Inbox folder of the Voice Messages view.

   Note: Your Strata CS system can be synchronized with Microsoft Exchange so that changes you make to messages in one Inbox folder are reflected in the other. See “Microsoft Exchange Server synchronization” on page 12-13 for more information.
6. Click **OK** (see “Scheduling e-mail and pager notifications” on page 12-7).

To receive pager notification

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the Notification tab.
3. Select one of the following notification options on the drop-down list:
   - **Do not send pager notifications.** You do not receive pager notification of new voice messages.
   - **Send a page for all messages.** You receive a page whenever you receive a new voice message.
   - **Send a page for urgent messages only.** You receive a page whenever you receive a voice message marked Urgent.
4. In the **Page using** field, select the dialing service that you want Strata CS to use to dial your pager. For more information about dialing services, see “Using dialing services” on page 11-4.
5. In the **Dial Sequence** field, enter the dial string for your pager, including the phone number of the paging service and your pager's PIN if required. The dial string can contain any touch tone digit (0-9, *, #). You can enter commas to indicate 2-second pauses in the dial sequence.

   You can also use the following special characters to add information to the page:
   - I or i sends the caller ID number (for an external call) or Strata CS extension (for an internal call).
   - E or e sends the Strata CS extension that the caller dialed.
   - L or l sends the length of the voice message in seconds.

   Example: The dial sequence `18007771000,,,1245983#E` causes Strata CS to dial your paging service, pause for 6 seconds, enter your pager’s PIN (1245983) followed by # to indicate end-of-PIN, enter your extension (the extension at which the voice message was left), and then hang up. Your pager would display only the extension, 103 for example.
6. Click **OK**. See “Scheduling e-mail and pager notifications” on page 12-7.

Notes:

- If you receive only the last portion of the pager data that you specify, you may not have placed enough pauses between the pager number to be dialed and the information to send. If this problem occurs, add more commas to the **Dial Sequence** field.
- Do not enter multiple stars (*) in a row in the pager string. Use only one to send a dash. Multiple consecutive stars can terminate the page message.

Scheduling e-mail and pager notifications

You can schedule notifications to occur at specific times, for example, during business hours or after business hours on work days. You can also set up custom hours. You can create different schedules for e-mail and pager notification.

Note: If you turn e-mail or pager notifications on for a user, by default Strata CS sends notifications 24 hours a day, 7 days a week. If this is what you want to do, you do not need to schedule notifications.

Schedule entries

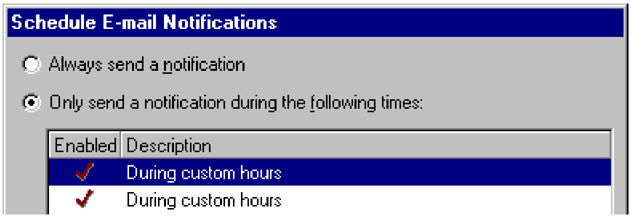
Your schedule is composed of individual schedule entries that Strata CS uses in combination. For example, if you want to be notified of new voice messages during business hours and all day on holidays, you can add one schedule entry for "during business hours" and another schedule entry for "on holidays." You can define your own custom schedule entries for even greater precision.

Each schedule entry can be enabled or disabled, which gives your notification schedule adaptability and flexibility. For example, if you do not want to be paged during the current holiday, you can disable the schedule entry for "on holidays." When you return after the holiday you can enable it again.

The following illustration shows an example of a schedule with two schedule entries that sends e-mail notifications for new voice messages during business hours and on holidays. Both schedule entries are enabled. No backlog of notifications is kept during the times when they are not being sent. If you schedule notifications to occur only during certain times, you do not receive notifications during the other times.

To define a schedule for notifications

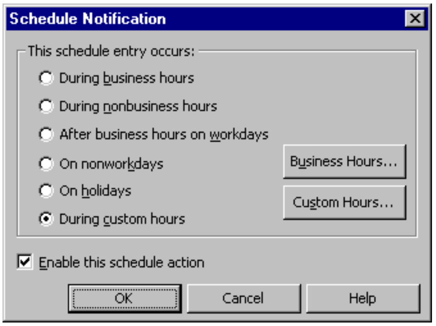
1. Choose **Tools > Options**. The Options dialog box opens
2. Click the Notification tab.
3. Choose an option under **After receiving a message, notify me via e-mail** or under **After receiving a message, notify me via pager**.
4. Click **Schedule** to define an e-mail or pager notification schedule.
5. The Schedule E-mail (or Pager) Notifications dialog box opens and displays any existing schedule entries that have been defined so far.



6. Select one of the following:

   - **Always send a notification.** The schedule (if any has been set up) is ignored, and you receive notification of new voice messages at all times.
   - **Only send a notification during the following times.** You receive notification only during the times specified in your schedule.

7. To add a schedule entry, click **Add**. The Schedule Notification dialog box opens.



8. To specify which business hours to use for scheduling, click **Business Hours**. Your office may have set up multiple sets of business hours, for example, one set for the sales department and another for support. In the Business Hours dialog box under **Name**, select the business hours on which you want to base your schedule, and then click **OK**.

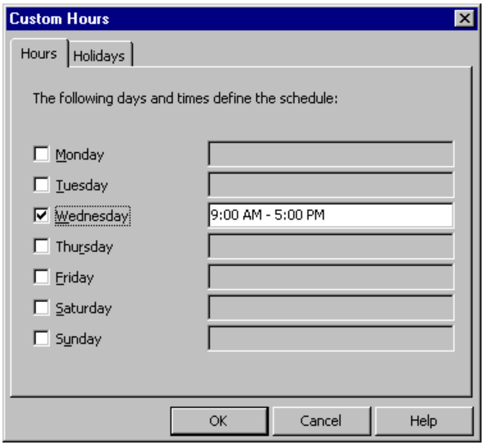
   Note: If your office has no business hours set that matches your notification needs, you can do two things: ask your Strata CS administrator to create a new set for you or define custom hours for notification (see the next step).

9. Under **This scheduled entry occurs**, choose a time when you want to be notified of new voice messages. In the examples below, business hours are Monday through Friday, 9:00 a.m. to 5:00 p.m.:

   - **During business hours.** Notifications are sent Monday through Friday, 9:00 a.m. to 5:00 p.m.
   - **During nonbusiness hours.** Notifications are sent at all times other than business hours, including early mornings, evenings, weekends, and holidays. In this example, notifications are sent Monday through Friday, 5:01 p.m. to 8:59 a.m., and on Saturdays, Sundays, and holidays.
   - **After business hours on work days.** Notifications are sent Monday through Friday, 5:01 p.m. to 8:59 a.m.
   - **On nonwork days**. Notifications are sent on Saturdays and Sundays.

- **On holidays**. Notifications are sent on holidays.
- **During custom hours**. Notifications are sent during the days and hours you define, independent of your office's business hours and holiday hours. Click the **Custom Hours** button to specify when to receive notifications. The Custom Hours dialog box opens.

  On the Hours tab, enter the days and times.



  On the Dates tab of the Custom Hours dialog box, click **Add** to specify individual calendar dates. When your custom hours are finished, click **OK**.

10. To receive notifications during the times you have chosen, make sure **Enable this schedule action** is checked in the Schedule Notification dialog box, and then click **OK**. You return to the Schedule E-mail (or Pager) Notification dialog box.
11. To add more schedule entries, repeat this procedure. When your schedule is finished, click **OK**.

Listening to your voice messages

To listen to a voice message, double-click the message. For further instructions on using the audio controls, see "Using the audio controls" on page 7-22.

You can play the message either over your computer's speakers or over your telephone. Choose **Tools > Audio Output** to switch audio output from one to the other, or use the button in the status bar.

If you have call announcing turned on, messages less than five (5) seconds in length are prefaced by a recording of the caller's name.

Note: You can open some Client views while a message is playing and the

message will continue to play. The message stops playing, however, if you open a view with another audio control visible, for example, the Greetings view.

To listen to a voice message as it is being left

1. Open the Call Monitor view by clicking its button in the view bar.
2. Choose **Actions > Screen Message**.
3. Pick up your phone and listen to the voice message as it is being left. This is a one-way connection. The caller cannot hear you.
4. To take the call while the caller is leaving a message, choose **Actions > Take Call**. You are connected to the caller. The caller's message up to that point is left as a new voice message.

You can listen to a voice message as it is being left via the phone. See "Call announcing" on page 4-2.

Handling your voice messages

You can perform the following tasks on a voice message:

- Forward it to other users
- Reply to one or more users directly with a voice message of your own
- Return the call, provided the caller ID or contact was identified
- Send the voice message as a .WAV file attachment to an e-mail message
- Send a new voice message to other users
- Delete a voice message
- Associate a message with a contact
- Mark an existing message Private, unheard, or Urgent
- Add notes to an existing message

Forwarding a voice message

You can forward a voice message, except if it is marked Private, to one or more Strata CS users. A copy of the message is sent directly to the voice mail of all recipients.

You can also attach a recording of your own at the beginning of the forwarded message. For example, you can record, "Bob, this is Jim. I received this message and thought you would want to hear it." Your recording precedes the forwarded message.

To forward a voice message

1. In the Voice Messages view, right-click a voice message that you want to forward and select **Forward** on the shortcut menu. The Forward Message dialog box opens.
2. In the **Available Users** list, select the users to whom you want to forward the message. To select multiple users, press CTRL while you select users.
3. Click **Add** to move the selected users to the **Recipients** list.
4. Record a short message that introduces the message you are forwarding. Use the audio controls (for detailed instructions, see “Using the audio controls” on page 7-22).
5. Click **Send**. A copy of the selected voice message, preceded by your short introductory message, is forwarded to the users in the Recipients list. When recipients select the message, they can view (in the **To** field) a list of other users who received the same message. Users can reply to the sender or to all recipients.

The envelope icon next to a message you have forwarded changes to  .

Replying to a voice message

Replying to a voice message lets you send a recorded reply directly to the voice mail of the user who sent you the message. You can send the reply to other users as well. The instructions are the same as for forwarding a message.

The envelope icon next to a message to which you have replied changes to  .

You can reply in this way only to a message left by another Strata CS user. You cannot send a message in reply to a message left by an external caller.

Note: Replying to a message sends a new message to another user’s voice mail. To call back the person who left you the voice message, choose Call on the Messages menu instead (see the next section).

To reply to all recipients of a message

1. Select the message.
2. Click **Actions > Reply to all**.

The recipients are listed in the Recipients pane of the Reply to Message dialog box.

Calling back the person who left a voice message

You can call back the person who left you a voice message by using the Strata CS **Place Call** or the **Speed Dial** command. **Place Call** lets you choose the number to call if several numbers are available. **Speed Dial** returns the call to the default number.

To call a person back

1. Select the voice message you want to call back.
2. On the **Actions** menu, choose **Place Call** or **Speed Dial**.

Note: On messages from unidentified callers, Strata CS places a call to the phone number from which the message originated. If the message was left by someone calling from an office (PBX) extension, you might not be able to connect to the correct party.

E-mailing a voice message

You can e-mail a voice message as a .WAV file attachment to someone who is outside the Strata CS system.

To e-mail a voice message, you must have an e-mail reader that supports MAPI installed on your computer, such as Microsoft Outlook or Eudora Pro.

To e-mail a voice message

1. Select the message you want to send by e-mail.
2. Choose **File > Send To Mail Recipient**. Your MAPI mail client Send dialog box opens with the message attached.
3. Address and send the e-mail as you normally would.

Broadcasting voice mail

You can record a new message and send it directly to the voice mail of one or more Strata CS users.

1. Choose **File > New > Voice Message**. The New Message dialog box opens.
2. Select the users to whom you want to send the message on the **Available Users** list. To select multiple users, press CTRL while you select users.
3. Click **Add** to move the selected users to the **Recipients** list. These users will receive the message.
4. Record the message by using the audio controls. For detailed instructions, see "Using the audio controls" on page 7-22.

5. Mark the message Urgent or Private as needed by checking the **Mark Urgent** or **Mark Private** boxes.
6. In the **Notes** field, type any notes you want to add to the message.
7. When you are ready to send the message, click **Send**.

Deleting voice messages

By default, messages in the Deleted folder that are older than three days are permanently removed from Strata CS. For information about how to change the default, see "To empty the Deleted folder automatically" on page 7-19.

To move a voice message to the Deleted folder

1. Select the message.
2. Choose **Edit > Delete**.

The message is moved to the Deleted folder. You can still play it or retrieve it if necessary.

Deleting a message permanently

To delete a message permanently, select the message and press SHIFT+DELETE. A message is also deleted permanently when you delete it from the Deleted folder or empty the Deleted folder. See "Managing the Deleted folder" on page 7-18.

Microsoft Exchange Server synchronization

If your office uses Microsoft Exchange Server for e-mail, Strata CS can synchronize the Voice Messages view's Inbox and Deleted folders with those in your e-mail program. When synchronized, messages you delete in one application are deleted in the other.

For example, if you delete a voice message e-mail attachment in your e-mail program, Strata CS moves the same message to its own Deleted folder. Similarly, if you delete the matching voice message in Strata CS, your e-mail notification moves to your e-mail program's Deleted folder.

For more information, see your Strata CS system administrator.

Associating a voice message from "Unknown" with a contact

A voice message that appears from "Unknown," means that Strata CS could not identify the caller. You can associate the message with a contact, so that the correct name appears in the Call Monitor and so that Strata CS identifies the contact on subsequent calls from that phone.

See "Associating a call or caller ID number with a contact" on page 15-10 for complete instructions.

Marking a voice message Heard or Unheard

The envelope icons indicate whether or not you have listened to a message.

To mark an old voice message as new (unheard), select the message and then choose **Actions > Mark As Unheard**.

Marking a voice message Urgent or Private

You can mark a voice message Urgent, Private, or both. Private messages cannot be forwarded, and users who share your mailbox cannot play them, reply to them, or call back the sender.

The icons in the columns to the right of the envelope icon show whether a message is Urgent ! or Private .

- To mark a voice message Urgent, select the message and choose **Actions > Urgent**. Select the command again to remove its Urgent status.
- To mark a voice message Private, select the message and choose **Actions > Mark As Private**. After a message is marked Private, it cannot be made not Private again.

Adding notes to a voice message

To add written notes to a voice message, click the message and type your notes in the Detail pane at the bottom of the Voice Messages view.

Any notes that you create for a message accompany that message if it is forwarded to other users.

Hiding and showing notes

To hide or display the Detail pane, choose **View > Detail pane**. To hide the Notes column, see “Showing and hiding columns” on page 18-11.

Organizing voice messages in folders

Strata CS allows you to archive your voice messages in folders that you create. You can create as many folders and subfolders as you want. See “Organizing the contents of a view in folders” on page 7-16.

Sharing your voice messages

You can share your voice message folders with other Strata CS users, including your Inbox folder, your Deleted folder, and your Saved folder. You can also share any custom folders that you create. See “Sharing views and folders” on page 7-19

Viewing your voice mailbox size

Your voice mailbox has a limited amount of disk space (in minutes) to store your voice messages. Ask your Strata CS system administrator for the total number of minutes that have been allocated to you. The Strata CS default is 20 minutes.

All voice files in all your folders count against your total mailbox space, including messages in the Deleted folder and recorded conversations. When your mailbox is full, callers cannot leave you voice mail. They hear a message telling them that your mailbox is full.

If you log in by using the telephone commands and your mailbox is nearly full, you Strata CS prompts you to empty the Deleted folder.

To view the amount of space remaining in your mailbox

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the Voice Messages tab. The **Usage** progress bar indicates how close your voice mailbox is to being full.

Note: When your mailbox is nearly full, you hear a warning message when you start the Client or when you log in on the telephone.

Setting a maximum length for your voice messages

You can set a maximum length for voice messages. If a message exceeds the time limit, Strata CS ends the message. The default maximum is 180 seconds (three minutes). The highest maximum you can set is 600 seconds (five minutes).

To set the maximum length for voice messages

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the Voice Messages tab.
3. In the **Maximum message length** field, enter a number of seconds.
4. Click **OK**.

Managing greetings

Greetings are recorded messages that callers hear when they reach your voice mail. For example, “This is Steve. I’m not at my desk at the moment, but leave me a message and I’ll get back to you soon.”

With Strata CS you can record and store multiple greetings and specify when you want Strata CS to use each one. For example, you can have a normal greeting for everyday use, another greeting for extended absences, and a third greeting for vacations. You can also create and use custom greetings for individual callers (see Chapter 16).

Greetings for situations other than voice mail

You may need to record greetings for other circumstances than voice mail. Strata CS often plays a greeting before the final action of a routing list. If your account has no voice mailbox, or if you create a routing list with a final action of "Transfer to extension," "Hang up," or "Hold/Restart," you might need to record a greeting that tells the caller about those actions. See "Matching active greetings with active routing lists" on page 14-14.

Space for greetings

You have a limited amount of disk space for greeting and voice title recordings. See your Strata CS system administrator to find out how much space has been allocated to you and how much you have used.

Using a grab-and-hold greeting

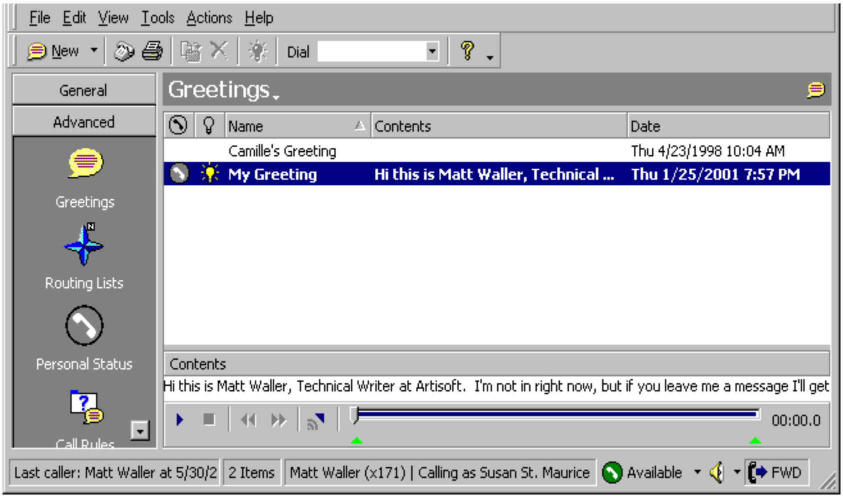
Your Strata CS account includes a special greeting called a grab-and-hold greeting that Strata CS plays to callers when you put incoming calls on hold without talking to the callers first. For more information about recording and using a grab-and-hold greeting, see "Using grab-and-hold on the call" on page 10-7.

Greetings and personal status

Your greeting settings may be overridden if you apply a personal status with different greeting preferences, or if you change your active settings directly. However, neither of these actions changes the settings in the Greetings view. For more information about personal status and the active settings, see Chapter 8.

The Greetings view

Click **Advanced** on the view bar to locate the button for the Greetings view.



The Greetings view contains three sections:

- **The Greetings list.** Your existing greetings appear here.
- **The Detail pane.** This pane is labelled “Contents” and is located at the bottom of the Greetings view. It displays the contents of the greeting. To hide or show the Detail pane, choose **View > Detail Pane**.
- **The audio controls.** Use these controls to record a new greeting or rerecord a selected greeting. See “Using the audio controls” on page 7-22.

The active greeting

The active greeting is the greeting that Strata CS plays by default when callers reach your voice mail.

The active greeting appears in bold text and marked by  . To designate a greeting as the active greeting, select it and choose **Actions > Set as Default and Active**. Only one greeting at a time can be the active greeting.

To make the greeting your active greeting without making it the personal status default greeting, double-click the greeting to edit it and check **Active greeting for this extension**.

Callers can hear greetings other than the active greeting if you have created call rules for those callers that play other greetings (see Chapter 16). Callers who are not the subject of a call rule hear your active greeting. You can change the active greeting by changing your personal status or by changing your Active Settings. See Chapter 8.

The personal status default greeting

The personal status default greeting is the greeting that is used whenever you select a personal status whose Greeting property is set to **Default**. For more information, see “Personal status defaults” on page 8-12.

The personal status default greeting is marked by . To make a greeting the greeting that you want to be your personal status default, select the greeting and choose **Actions > Set as Default and Active**.

To make the greeting your personal status default greeting without making it the active greeting, double-click the greeting to edit it and check **Default personal status greeting**.

Recording a new greeting

1. Choose **File > New > Greeting**. The Greeting dialog box opens.
2. Enter a **Name** for the greeting.
3. In the **Contents** field, enter a description of the greeting. This description can be the text of the statements used in the greeting.
4. Record the greeting by using the audio controls. See “Using the audio controls” on page 7-22.
5. Click **OK**.

To rerecord or edit an existing greeting, double-click the greeting in the Greetings view and edit the greeting by using the audio controls.

E-mailing a greeting

You can e-mail a greeting as a .WAV file attachment.

1. Select the greeting that you want to e-mail.
2. Choose **File > Send To Mail Recipient**. Your e-mail application’s Send dialog box opens with the greeting attached.
3. Address and send the e-mail as you normally would.

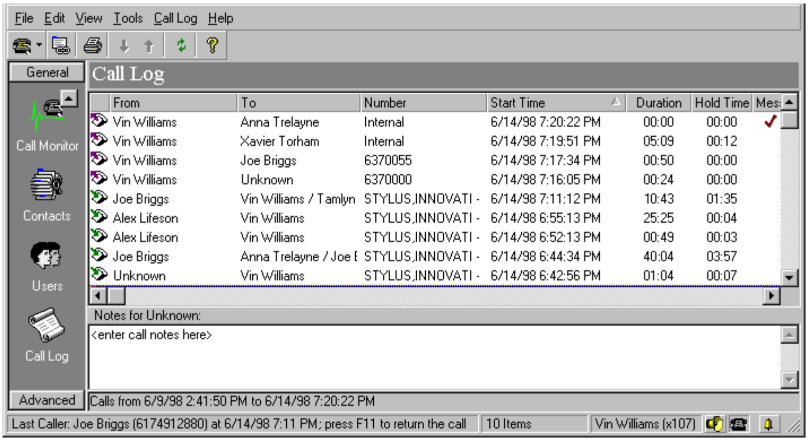
CHAPTER 13

USING THE CALL LOG VIEW

CHAPTER CONTENTS

The Call Log view

The Call Log view contains a record of all incoming and outgoing phone calls associated with your extension. Internal calls (calls between Strata CS users) may or may not be logged, depending on how your Strata CS system administrator set up the system.



Note the following features of the Call Log view:

- Incoming calls appear with this icon: 
- Outgoing calls appear with this icon: 
- "& others" in the **To** column indicates a call with more than two parties, for example, a conference call or a call that was transferred. Double-click the call to see all the names in the Call Details window.
- Notes about a call can be entered by clicking in the Notes pane and typing.

Call Log view columns

The following table shows the columns that are available in the Call Log view. Additional columns are visible when you view call details (see "Viewing call details" on page 13-4).

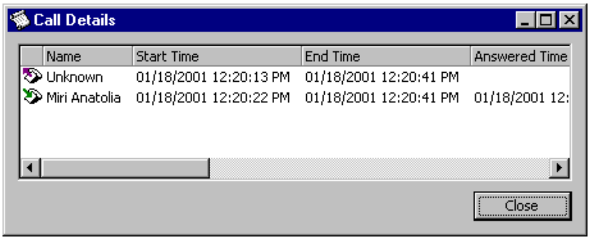
To show or hide columns, see "Showing and hiding columns" on page 18-11.

Column	Description
 	Indicates incoming or outgoing calls, respectively.

Column	Description
From	Name of the person who originated the call. On incoming calls, “Unknown” appears unless the user identified the caller as a contact. On outgoing calls, the user’s name appears.
To	Name of the party who received the call. On incoming calls, this is the user’s name. On outgoing calls, “Unknown” appears unless the user identified the person as a contact.
Number	On incoming calls, caller ID name and number if available. On outgoing calls, the number the user dialed. On a call to or from another Strata CS user, this field contains <NA>.
Start Time	Date and time that the call started.
Duration	Length of the call, beginning at the time when the two parties are connected.
Result	How the caller’s wait ended. The possible outcomes are: **Abandoned** The caller hung up before the call was answered. **Connected** The call was answered. **To voice mail** The call was sent to voice mail. **Blind Transfer** A blind transfer sent the caller to another party. **Supervised Transfer** A supervised transfer sent the caller to another extension. **Unknown** Strata CS was unable to identify the outcome of the call. **Login** You logged in to Strata CS at a remote phone.
Left Message	If checked, the caller left a voice message.
Notes	Any notes associated with the call. See “Taking notes on a Call Log entry” on page 13-6.

Viewing call details

You can view more information about your calls by double-clicking an item in the Call Log view. The Call Details window opens.



Call Details columns

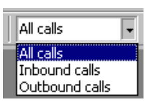
The Call Details window contains the columns shown in the following table.

Column	Description
 	Indicates the incoming and outgoing aspect of the call, respectively.
Name	Name of the person who originated the call. On incoming calls, “Unknown” appears unless the user identified the caller as a contact. On outgoing calls, the user’s name appears.
Start Time	Date and time that the call first came in to the Strata CS system.
End Time	Date and time that the call ended.
Answered Time	Date and time that the call was answered.
Answered By	Name of the user who answered an incoming call. Useful for analyzing data for ACD workgroups.
Account Code	Account code associated with the call, if any. See “Entering an account code for a call” on page 4-9.
Number	On incoming calls, caller ID name and number if available. On outgoing calls, the number dialed. On a call to or from another Strata CS user, this field contains <NA>.

Column	Description
Number Type	The type of number displayed in the Number column. Types are: **Phone** External phone number **Internet** Internet or IP network address **Extension** Internal extension **Custom** Centrex extension
Access Code	On outgoing calls and incoming calls over an IP gateway, the access code of the dialing service used to place the call.
DID	On incoming calls, your Direct Inward Dial number if the caller used it to call you. DID is not applicable for outgoing calls.
Device	On incoming calls, the trunk or station number from which the call originated. On outgoing calls, your station number.
Dial String	Digits that Strata CS actually dialed over the trunk, which can be different than the digits Strata CS displays in a contact’s phone number. For example, a dial string can contain an international or long-distance access code, least-cost routing information, or dialing prefix or suffix.
Custom Data	Custom data, if any, associated with the call. Custom data can be collected by IVR Plug-ins or call center queues that prompt the caller for information.

Viewing inbound or outbound calls only

You can view inbound calls only, outbound calls only, or all calls by using the display menu on the right side of the Call Log toolbar.



Taking notes on a Call Log entry

You can take notes on a Call Log entry. Notes can help identify a call in the list or summarize important information about that call. Strata CS associates call notes with the caller, so the notes follow the caller around the system. The Detail pane displays any accompanying notes when a call arrives in your Call Monitor view.

To take notes on a Call Log entry, click the entry and then type your notes in the Detail pane. When you are done, you can press ENTER or click your mouse button anywhere. The notes you just created appear in the Detail pane for that Call Log entry.

Hiding and showing the Detail pane

To toggle between hiding and showing the notes pane, choose **View > Detail Pane**.

Associating a call from "Unknown" with a contact

When a Call Log entry appears from "Unknown," it means that Strata CS was unable to identify the caller. You can associate the call with a contact, so that the correct name displays and Strata CS identifies the contact on subsequent calls from that phone.

See "Associating a call or caller ID number with a contact" on page 15-10 for complete instructions.

Returning a call in the Call Log view

1. Select the call in the Call Log view that you want to return.
2. On the **Actions** menu, choose one of the following:
   - **Place Call.** This command lets you choose the number to dial from a submenu. If the caller is a contact, you can choose the phone number to call from the list of the contact's phone numbers. You can also choose to call by using the caller ID number of the call.
   - **Speed Dial.** This command places a call immediately to a user's extension, a contact's default number, or an unknown caller's caller ID number. You can also choose Speed Dial by double-clicking the call.
3. Click **OK**. Strata CS dials the number.

Reporting on the Call Log

If you want to create reports based on the Call Log, you can do either of the following:

- Export the Call Log and analyze the data in Microsoft Excel.
- Run the Strata CS Call Center Reporter by choosing **Tools > Reports.** Your must have the required licenses to use the Call Center Reporter and you also must have permission to use it. See your Strata CS system administrator about installing and running the Call Center Reporter.

CHAPTER 14

CALL FORWARDING AND ROUTING LISTS

CHAPTER CONTENTS

About call forwarding and routing lists

Strata CS provides two ways of receiving your calls at a phone other than your own, ensuring that you do not miss important calls when you are away from your desk:

- **Call forwarding.** Your incoming calls ring at another phone. You can use another extension or an external number (for example, your home phone number). Click **Tools > Call Forwarding** in any view to forward your calls to another number (see “Forwarding calls” on page 14-2).
- **Routing lists.** Your incoming calls try a series of phone numbers until you answer at one of them. Open the Routing Lists view to create routing lists (see “Using routing lists” on page 14-7).

Call forwarding and the Where I Am setting

When you forward your calls, you change a Strata CS setting called *Where I Am*. This setting specifies the phone that rings when you receive incoming calls. By default, Where I Am is your Strata CS station. You can change Where I Am in the following ways:

- **Forward your calls.** Where I Am becomes the number to which your calls are forwarded. See the next section, “Forwarding calls.”
- **Select a personal status.** Where I Am becomes the number specified in the personal status preference. See Chapter 8.
- **Change your active settings directly.** Where I Am becomes the number you specify. See “Personal status and your active settings” on page 8-10.

To view your current Where I Am location, choose **Tools > Active Settings**.

The Where I Am default

Where I Am has a default setting that is either your station or your call forwarding number. You can use the Where I Am default to temporarily override call forwarding. See “Using the Where I Am default” on page 8-13.

Forwarding calls

Call forwarding causes your calls to ring at another phone, either another extension or an external number. Call forwarding is useful when you are working away from your desk for a period of time.

Notes:

- Call forwarding automatically updates the default Where I Am location in all your routing lists and personal statuses. Whenever a routing list or

personal status would normally try you at your desk, it tries you at your forwarding phone number instead. See “Using routing lists” on page 14-7 for more information.

- Your call forwarding settings may be overridden if you apply a personal status with a specific Where I Am preference or if you change your active settings directly. For more information about personal status and the active settings, see Chapter 8.

Forwarding calls by using the telephone commands

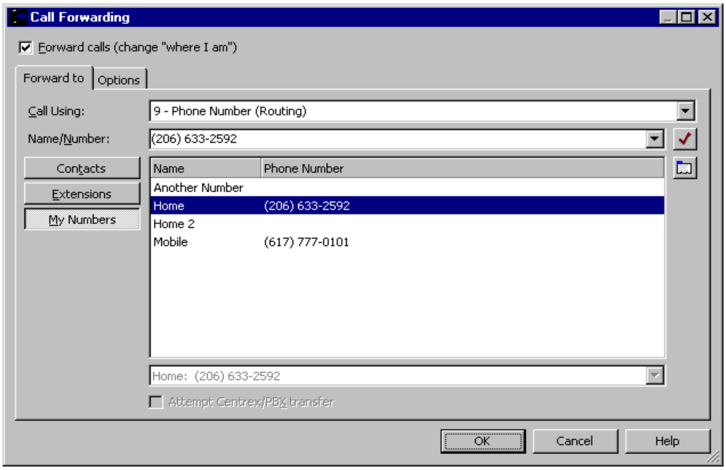
You can forward your calls without using the Client by using the telephone commands. See “Forwarding your calls” on page 4-11.

Forwarding calls in the Client

The following sections describe how to use call forwarding in the Strata CS Client.

To turn call forwarding on

1. Choose **Tools > Call Forwarding**. The Call Forwarding dialog box opens.



2. Check **Forward Calls (change “where I am”)**.
3. Do one of the following:
   - Click **Extensions** and select an extension on the list. You can also select a queue, auto attendant, IVR Plug-in, or workgroup.
   - Click **Contacts** and select a contact on the list. The contact’s default phone number appears in the drop-down list below the list. If the

contact has more than one phone number associated with it, you can select a different number on the list.

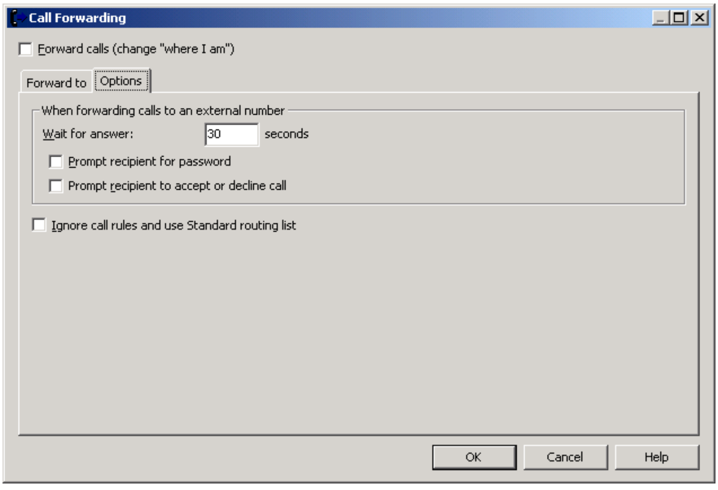
To create a new contact, click to open a new Contact dialog box. To edit the currently selected contact, press ALT and click . See “Entering a new contact” on page 15-4 for more information.

- Click **My Numbers**. To forward your calls to one of your own phone numbers, such as your home or mobile phone, select it on the list. To forward your calls to another number, type the number in the **Number** field.

  Note: When forwarding calls to a mobile phone, make sure that you check **Prompt recipient to accept or decline call** on the Options tab. See “Mobile phone issues with routing lists” on page 14-8 for more information.

At this point most users can click **OK** to complete call forwarding. The following steps are for advanced Strata CS users.

4. If you want to route calls by using the Centrex or PBX dialing service, check **Attempt Centrex/PBX Transfer**. See “Forwarding calls over Centrex or PBX trunks” on page 14-6 for an explanation.
5. To set other call forwarding options, click the Options tab.



You can set any of the following options:

- **Wait for answer.** Enter the length of time in seconds that you want a call to ring the forwarding number before proceeding to the next step on your routing list (usually your voice mail). If you are using the option **Prompt recipient for password** or **Prompt recipient to accept or decline call** (described later in this step), you should enter at least 30 seconds. If you enter less time, the call might be sent to

your voice mail before you finish listening and responding to the prompts.

- **Prompt recipient for password.** If checked, the person who picks up the phone hears, “Call for <your voice title>. Please connect me.” To be connected to the caller, you must enter your Strata CS password. Entering a password ensures that only you can receive your forwarded calls.

  This option works only when calls are forwarded to an external number, and when you have a voice title for yourself recorded. If you have not recorded a voice title, Strata CS will ignore your selection of this option. See “Recording your voice title” on page 2-2.

- **Prompt recipient to accept or decline call.** If checked, when you pick up the phone, Strata CS announces the caller (“Call from”) and intended recipient (“Call for”) and asks you to accept or decline the call. Declined calls proceed to the next step in your routing list, usually your voice mail.

  The call announcing prompt loops, so you might not hear it from the beginning when you pick up the phone. Press any key on your phone other than 1 or 2 to start the prompt at the beginning.

  This option is used only when forwarding calls to an external number. When forwarding to an internal extension, your call announcing settings are used. See “Customizing or turning off call announcing” on page 18-3.

- **Ignore call rules and use Standard routing list.** Check to send all your incoming calls to the specified number, regardless of any call rules or routing lists that you have created that might otherwise send a call to a different number. If you have not created custom call rules or routing lists, you do not need to check this box.

  This setting disables your call rules and uses the Standard routing list for all calls. See “Using routing lists” on page 14-7 for an explanation of routing lists and Chapter 16 for an explanation of call rules.

6. Click **OK**.

To turn call forwarding off in the Client

1. Choose **Tools > Call Forwarding**. The Call Forwarding dialog box opens.
2. Uncheck **Forward Calls**.
3. Click **OK**.

Note: When your calls are forwarded, 

appears in the status bar. Double-click this button to open the Call Forwarding dialog box.

Receiving forwarded ACD workgroup calls

If you receive calls as part of an ACD workgroup, and you have forwarded those calls to another number, the ACD workgroup user’s settings override your call forwarding settings. For example, you might have unchecked **Prompt recipient to accept or decline call**, but you might nevertheless get prompted to accept or decline the call when you receive an ACD call.

Placing calls at another user’s extension

Forwarding your calls to another user’s extension does not mean that you are logged in to that user’s station. When you place outgoing calls at another user’s phone, you are subject to the dialing restrictions and permissions that are in effect at that user’s station. Calls that you place at another user’s station appear in the Call Log view of that user.

To place calls as yourself from another user’s extension, log in either through the Client or the telephone commands. If you are using the telephone commands, log in, press **#** for a dial tone, and then place your outgoing call.

When you hang up, the station reverts to its regular user.

Call forwarding and voice mail

If no one answers at your call forwarding location, the caller is transferred to your voice mail.

To completely transfer your calls to another user's phone, so that the other user receives your voice mail as well as the calls themselves, do not use call forwarding. Instead, create a routing list whose only step is a final action of **Transfer to Extension**, and make this routing list your active routing list. (See “Using routing lists” on page 14-7.)

Forwarding calls over Centrex or PBX trunks

If your company has trunk lines that are connected by Centrex lines or an external PBX, you can forward calls by using the Centrex or PBX dialing service. Doing this frees Strata CS’s trunks to handle other calls.

You can check **Attempt Centrex/PBX transfer** when you set up call forwarding or when you set up a routing list step to a Centrex or PBX extension. If this option is checked, Strata CS attempts to route incoming calls to the external number on the same trunk line by using a Centrex or external PBX transfer, thus saving two

Strata CS trunks. Strata CS makes the attempt only when the incoming call is on an analog Centrex or PBX line. It routes incoming calls on other trunk types to the external forwarding number in the usual way (using a second trunk).

Note: Forwarding calls with this method avoids tying up extra trunks. However, when a call is routed out using a Centrex or PBX transfer, Strata CS loses control of it and cannot send it to subsequent steps on the user's routing list. For example, after transfer using Centrex or PBX, a call cannot go to voice mail.

Using routing lists

A *routing list* is a series of phone numbers that Strata CS dials when calls for you arrive. If you do not answer at one location, Strata CS proceeds to the next. For example, you can set up a routing list that tries you at your desk, then at your home, and finally at your mobile phone.

A routing list also contains a final action that determines what happens if no one answers by the end of the list. Usually the caller is sent to your voice mail, but you can specify other final actions. For example, you can transfer calls to another extension, put callers on hold and try the series of numbers again, or hang up.

You can create as many routing lists as you want and make any one of them the active routing list at any time.

How routing lists move from step to step

A routing list moves to the next phone number in the series if it:

- Detects a busy signal
- Encounters the three-tone operator intercept, for example, when a number is not in service
- Rings for a number of seconds that you specify

You can have Strata CS prompt the recipient to accept or decline the call. In that case, the routing list moves on unless someone presses **1** to accept the call. You can choose to prompt the recipient at external phone numbers only. See "Creating a new routing list" on page 14-9 for more information.

Caller options while following a routing list

When a routing list moves to the next step, Strata CS can alert the caller and offer the following choices:

- Try the next number.
- Leave a voice message.
- Return to the main menu.

You can specify whether Strata CS offers these choices for each step in the routing list. See “Creating a new routing list” on page 14-9.

Mobile phone issues with routing lists

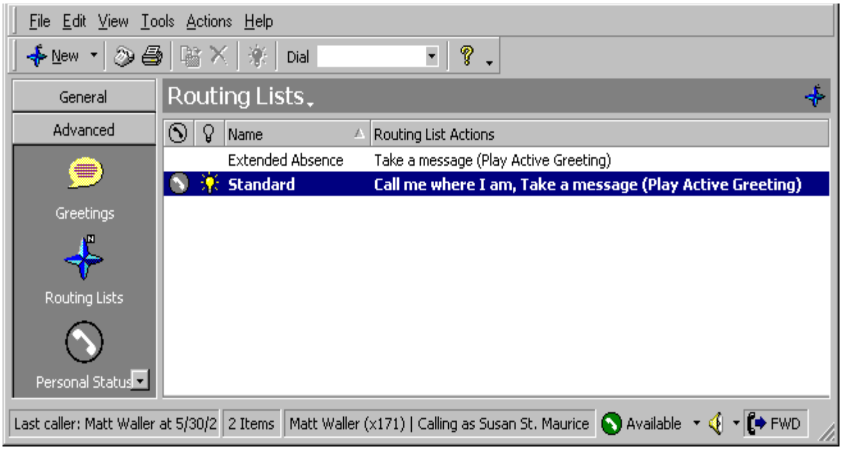
Calls to a mobile phone are picked up by the mobile phone company first and then passed to the individual phone. When Strata CS detects this first pickup, it stops proceeding down the routing list, whether or not you actually answer the mobile phone. For this reason, when you put a mobile phone in your routing list, always check **Prompt recipient to accept or decline call**. Strata CS then relies on user input to signal a connection and will proceed down the routing list, unless you explicitly accept the call.

Routing lists for individual callers

By using call rules, you can have Strata CS use a specific routing list for a specific caller or group of callers. For example, you can have a routing list for important customers that includes trying your mobile phone and another routing list for everyone else that only rings your extension. See Chapter 16 for more information.

The Routing Lists view

Click **Advanced** on the view bar to locate the button for the Routing Lists view.



The Standard routing list

The Standard routing list is the default routing list that is built into Strata CS. It consists of one step: trying you at your Where I Am location. (See “Call forwarding and the Where I Am setting” on page 14-2.) If you are busy or do not answer, the routing list sends the caller to voice mail.

You cannot edit the Standard routing list. To have calls follow a different route, you must create a new routing list and make it the active routing list.

The active routing list

The active routing list is the routing list that all incoming calls follow by default. Calls can follow another routing list if you have created call rules for them (see Chapter 16). Only one routing list at a time can be the active routing list. The active routing list is marked by bold text and the button.

You cannot delete the active routing list.

To make a routing list the active routing list

1. Right-click the routing list that you want to make the active routing list.
2. Choose **Actions > Set as Default and Active**.

You can also edit the routing list and check **Active routing list for this extension**.

Note: Your active routing list may be changed if you apply a personal status with a different routing list preference, or change your active settings directly. For more information about personal status and the active settings, see Chapter 8.

The personal status default routing list

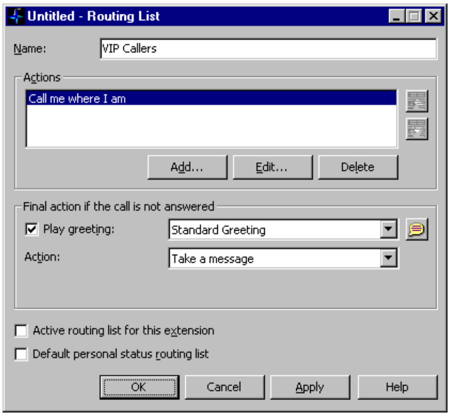
The personal status default routing list is the one that is used whenever you select a personal status whose Routing List preference is set to **Default**. For more information, see “Personal status defaults” on page 8-12.

The personal status default routing list is marked by the icon. To make a routing list the personal status default, select the routing list and choose **Actions > Set as Default and Active**. You can also edit the routing list and check **Default personal status routing list**.

Creating a new routing list

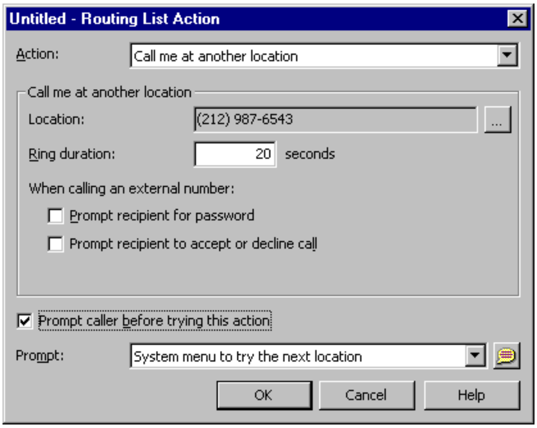
1. Choose **File > New > Routing List**. The Routing List dialog box opens. Under **Actions**, the steps of your routing list appear in the order that

they will be completed. Each step is a phone number at which Strata CS will try to reach you.



2. Enter a name for the routing list in the **Name** field.

3. Click **Add** to add a routing list step. The Routing List Action dialog box opens.



4. In the **Action** field, choose one of the following actions. The other elements in the dialog box change depending on your selection.

   - **Call me where I am.** This action directs calls to your Where I Am phone, which is your station unless you have changed it (see “Call forwarding and the Where I Am setting” on page 14-2). Specify the length of time the phone should ring in the **Ring duration** field.

   - **Call me at another location.** This action directs calls to an extension or external number of your choice. Click ... to open the Call Me at Another Location dialog box. This dialog box functions

in the same manner as the Place Call dialog box. For information on how to use this dialog box, see “Placing a call” on page 11-2.

If you choose an external number, see step 5 for further options.

Calls routed to another extension do not follow call forwarding or routing lists in effect at that extension. To send calls to another extension so that they follow that extension’s forwarding or routing list, use a final action of **Transfer To extension**.

You cannot route calls to an auto attendant or queue as a routing list step, but you can do so by using a final action of **Transfer To extension**.

- **Call a Workgroup.** This action directs calls to one or all members of a workgroup. Usually this action is used only by system administrators setting up an ACD workgroup. For instructions see “Routing calls to workgroups” on page 14-13.
- **Play Greeting.** This action does not ring a phone, but instead plays the caller the greeting that you select on the **Greeting** drop-down list. You can also play a greeting as part of each step and the final action. To record a new greeting from this dialog box, click . See “Managing greetings” on page 12-15.

5. If you are routing the call to an external number, you can use the following options under **When calling an external number**:
   - **Prompt recipient for password.** The person who answers the phone hears, “Call for <your voice title>. Please connect me.” To be connected to the caller, you must enter your Strata CS password. Using this option ensures that only you can receive your calls at the external phone number.

     This option is available only if you have recorded a voice title. See “Recording your voice title” on page 2-2 for more information.
   - **Prompt recipient to accept or decline call.** Strata CS announces the caller (“Call from”) and the intended recipient (“Call for”), and offers the option to accept or decline the call. Declined calls proceed to the next routing list action.

     With this option checked, the call will not be connected unless someone presses **1** to accept it. For this reason, leave the field unchecked when routing to a pager.
6. To play the caller a message before the routing list tries this step, check **Prompt caller before trying this action**, and then select the message on the drop-down list. You can select one of your greetings or **System menu to try the next location**, which offers the caller options (see

“Caller options while following a routing list” on page 14-7). You can also click  to create a new greeting.

7. Click **OK** to add this step to your routing list. The Routing List Action dialog box closes, and the new step appears under **Actions** in the Routing List dialog box.

   Repeat steps 3-7 to create additional steps for the routing list.

8. When you have finished creating the steps that you want to the routing list to take, in the Routing List dialog box, specify the **Final action if the call is not answered**. That is, specify what you want Strata CS to do if it gets to the end of the routing list and no one has answered.

   To play a greeting before the final action, check **Play greeting** and choose the greeting on the drop-down list. For information on the System hold greeting, see the **Pause and repeat** final action in the following list.

   Select one of the following final actions on the **Action** drop-down list:

   - **Take a message.** The call is sent to your voice mail.
   - **Hang up.** Calls from Strata CS users are disconnected. External callers are transferred back to your company’s main menu.
   - **Transfer to extension.** The call is transferred to an extension that you select on the **Extension** drop-down list, for example, an operator, a co-worker who handles your calls, or an auto attendant. The transferred call is treated as a new call to that extension. If no one answers at that extension, the call follows that extension's routing list.
   - **Pause and repeat.** The caller holds for the number of seconds you define in the **Pause duration** field, and then begins the routing list again. During the pause, callers can press **0** for the operator or **1** to leave a voice message. The greeting you choose can mention these options.

     In the list of greetings is a special prerecorded greeting called the System Hold Greeting. It says, “The person you are calling is unavailable. To hold, please stay on the line. To leave a message, press 1.” It does not mention the option to press 0 for the operator.
   - **Transfer to an extension.** The call is transferred to an extension that you select on the Extension drop-down list, for example, an operator, a co-worker who handles your calls, or an auto attendant. The transferred call is treated as a new call to that extension. If no one answers at that extension, the call follows that extension's routing list.

- **Pause and repeat.** The caller holds for the number of seconds you define in the **Pause duration** field, and then begins the routing list again. During the pause, callers can press **0** for the operator or **1** to leave a voice message. The greeting you choose can mention these options.

  In the list of greetings is a special prerecorded greeting called the System Hold Greeting. It says, “The person you are calling is unavailable. To hold, please stay on the line. To leave a message, press 1.” It does not mention the option to press 0 for the operator.

9. Check **Active routing list for this extension** if you want to make this routing list your active routing list.
10. Check **Default personal status routing list** to make this routing list the default routing list for your personal status settings.
11. Click **OK** to save the routing list and close the Routing List dialog box.

Routing calls to workgroups

A routing list step can send a call to a group of people rather than a single phone, by using the action **Call a workgroup**. Anyone in the workgroup can answer the call. Strata CS system administrators must use this option to set up ACD (automatic call distribution) workgroups.

You define the group as a workgroup. It can contain users and contacts, and can be as large or as small as you want. See “Using workgroups” on page 15-13 for instructions on creating a workgroup.

To route calls to a workgroup as a step in an existing routing list

1. Double-click the routing list in the Routing Lists view. The Routing List dialog box for that routing list opens.
2. Click **Add**. The Routing List Action dialog box opens.
3. In the **Action** field, select **Call a Workgroup**.
4. Select a **Workgroup** or click  to create a new workgroup.
5. Under **Method**, choose one of the following ways to ring the workgroup’s phones:
   - **Sequentially from the top down.** The call tries each member of the workgroup in order until answered, starting with the first user.
   - **Individually in a round robin.** The call tries each member of the workgroup in order until answered, starting with the next user in line after the one who answered the preceding call.

- **Simultaneously.** The phones of all workgroup members ring simultaneously, and the call goes to the first user who accepts it. Any contacts in the workgroup are ignored.

6. In the **Ring duration** field, specify the length of time each workgroup phone should ring before the call tries the next phone in the workgroup.
7. For external numbers in the workgroup you can choose to **Prompt recipient to accept or decline call.** When calling a workgroup, **Prompt recipient for password** is automatically selected, so that ACD calls are guaranteed to be answered by agents.
8. To play callers a message before they are routed to the workgroup, check **Prompt caller before trying this action**, and select the message on the **Prompt** drop-down list.
9. Click **OK**. You return to the Routing List dialog box, in which the new routing list step appears in the **Actions** list.
10. Use the arrows next to the **Actions** list to reorder any steps in the routing list and then click **OK**.

When routing calls to a workgroup, you can use the **Pause and repeat** final action. This action keeps callers on hold until a member of the workgroup answers the call. Calls are answered in the order of longest hold time, or “first in, first out” (FIFO).

Using greetings with routing lists

If you create routing lists with different final actions, you should record greetings that describe those actions. For example, if the final action is “Take a message,” your regular voice-mail greeting is appropriate. Examples of greetings for final actions are the following:

- **Hang Up:** “I’m sorry you couldn’t find me. I’m not taking messages at the moment. Good-bye.”
- **Transfer to extension:** “I’m sorry you couldn’t find me. I’m transferring you now to my administrative assistant.”
- **Pause and repeat:** “I’m sorry, I’m not available at the moment. Please hold.”

See “Managing greetings” on page 12-15 for instructions on recording greetings.

Matching active greetings with active routing lists

Make sure that your active greeting matches the final action of your active routing list. The active greeting and the active routing list are the greeting and routing list that are used for all calls you receive, unless you specify otherwise by creating a

call rule that handles specific calls. When you create a call rule, make sure that the call rule’s greeting matches the final action of the call rule’s routing list. For information about call rules, see Chapter 16.

CHAPTER 15

MANAGING CONTACTS AND WORKGROUPS

CHAPTER CONTENTS

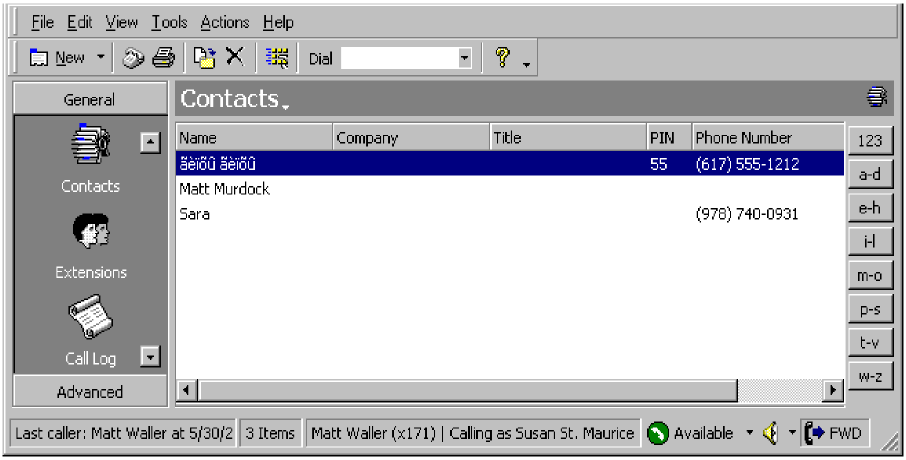
About contact management and Strata CS

Strata CS provides you with an online phone book of your telephone contacts in which you can enter the names, phone numbers, and other information about people you talk with frequently on the phone. After you enter contacts, you can place calls to them with a few clicks of the mouse.

This chapter describes the Contacts view and then explains the following aspects of working with contacts:

- Managing contacts in the Client
- Teaching Strata CS to recognize your contacts
- Using workgroups

The Contacts view



Using contacts folders

You can create folders to organize your contacts. For example, you could have a Friends folder for personal contacts that keeps your friends separate from your other contacts. Separating contacts into folders makes it easier to find your contacts quickly. See “Organizing the contents of a view in folders” on page 7-16.

Using the A-Z buttons for quick access

Use the A-Z buttons on the right side of the Contacts view to quickly move to a letter of the alphabet. The buttons alphabetize your contacts according to the column by which the view is currently sorted.

Private and public contacts

In Strata CS, contacts can be private or public, as follows:

- **Private contacts** are your own personal contacts. These contacts appear only in the Contacts view of your Client on your computer. Other users cannot see your contacts unless you explicitly share your Contacts folder with them.
- **Public contacts** are contacts that are available to all users in your office in their Client applications. Public contacts appear only in the folder named Contacts under Public Folders in the Folder List. Anyone in your office can see these contacts as a view by clicking the folder. Strata CS uses this folder to identify these callers throughout your office.

To view public contacts, select **Public Folders** in the folder list, and then select the Contacts view within that folder. See “Using the Folder List” on page 7-16. You can also view public contacts by choosing **Actions > Place Call**.

To enter or edit a public contact, you must have public contact editing permissions. If you do not have those permissions, you can view and place a call to public contacts, but you cannot edit them.

Changing double-click behavior

You can choose whether double-clicking a contact opens the contact for editing or places a call to the contact. See “Defining double-click behavior in the Contacts view” on page 18-10 for more information.

Managing contacts in the Client

You can manage your contacts using the Strata CS Client, or you can use another contact manager application or customer relationship management program with Strata CS if you prefer.

Note: You can also import contacts from other contact managers into Strata CS.

Using Strata CS Client contacts

You can enter or import your contacts in the Contacts view of the Client (see “Entering a new contact” on page 15-4 and “Importing and exporting contacts” on page 7-23). Working with your contacts in the Contacts view lets you take full advantage of Strata CS’s automated call-handling features.

Using contacts in another contact manager

If you make extensive use of another TAPI-compatible contact manager or customer relationship management application such as Microsoft Outlook, GoldMine, FrontOffice 2000, or Act!, you can place calls to your contacts from

those applications by using the Strata CS TAPI Service Provider. See your Strata CS system administrator about installing the TAPI Service Provider, and then follow your contact manager's instructions for placing calls. Calls placed by other applications still appear in your Strata CS Call Log and Call Monitor views.

You can also install the Strata CS Contact Manager Assistant (CMA) and receive screen-pops showing the name, the caller ID, and the time of day of the call. Act! users can receive screen-pops without installing the CMA.

You do not need to have the Strata CS Client installed to use the TAPI Service Provider or the CMA.

Using the Strata CS Contact Manager Assistant

The Contact Manager Assistant enables Microsoft Outlook, GoldMine, or FrontOffice 2000 contact managers to pop up contact information automatically when contacts in one of your contact managers call. Strata CS recognizes the incoming caller ID number, Caller ID, or name.

To run the Contact Manager Assistant (CMA)

1. Choose **Start > Programs > Toshiba Strata CS > Contact Manager Assistant**. The program starts and runs in the background.
2. Right-click  in the system tray for a shortcut menu of commands that you can use to configure and personalize the program. For further instructions, see the CMA's online Help.

Entering a new contact

Entering a new contact involves the following tasks, which are explained in detail in the three procedures that follow:

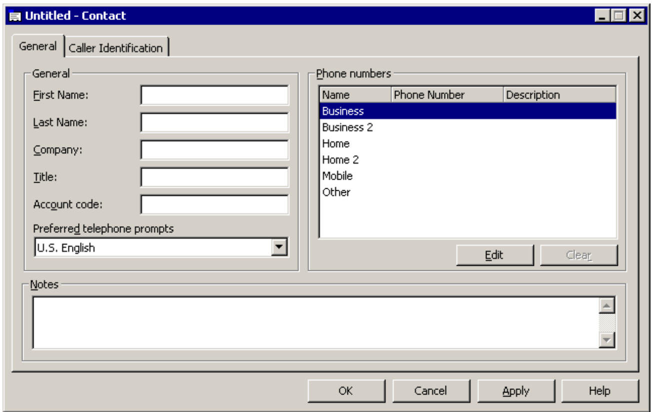
- **Entering a contact's name and basic information.** Other basic information includes the contact's company, any account code, and the language used for prompts for this contact. You can also enter up to 5,000 characters in the Notes pane of the Contact dialog box.
- **Entering a contact's phone numbers.** When you enter a contact's phone numbers, you can specify the number used for caller ID and the number that is the default number to dial when you call the contact.
- **Recording a contact's voice title.** Like your own voice title, a contact's voice title is a short recording that you create of the contact's name. If you are using call announcing, Strata CS announces calls from the contact by saying "Call from," followed by the contact's voice title. Contacts who do not have voice titles recorded are prompted to say their names each time

they call you, unless you have turned off that prompt (see“Customizing or turning off call announcing” on page 18-3).

Note: You have a limited amount of space for all voice files, including voice titles. Therefore, if you have many contacts, you can save space by recording voice titles for the most important ones only. Ask your Strata CS system administrator how much space you have been allocated and how much you have used.

To enter a contact’s name and basic information

1. Choose **File > New > Contact**. The Contact dialog box opens to the General tab.



2. If you have global (public and private) contact editing permissions, you can choose whether this is a private or public contact. Select the appropriate type on the **Category** drop-down list (not shown in the previous figure). See “Private and public contacts” on page 15-3 for more information.

3. Enter the appropriate information about the contact in the **First Name, Last Name, Company,** and **Title** fields. The first and last names are displayed in the Call Monitor view when this contact calls you.

   Either a first name or a last name is required. To create a contact that has the name of a company only, enter the company name into one of these fields.

4. If your office uses account codes, you can enter an **Account code** for the contact. Strata CS automatically uses the account code for the call when it identifies the contact on an incoming call or when you dial one of the contact’s numbers on an outgoing call.

   If you are prompted to enter account codes when you place calls, you will hear a double beep instead of a single beep to indicate you are

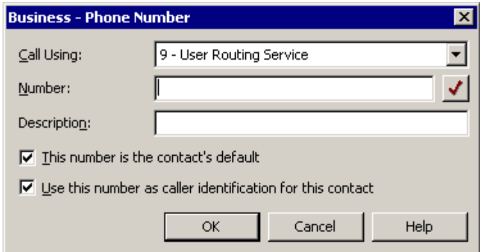
dialing a contact with an account code. When you hear the double beep, you can press **#** on your phone to accept the contact’s account code, instead of entering an account code.

For more information, see “Entering account codes when placing calls” on page 3-3.

5. In the **Preferred telephone prompts** drop-down list, select the language that you want Strata CS to use when it plays prompts to this contact. The available languages are the languages that were installed on your system.

To enter a contact’s phone numbers

1. On the General tab in the Contact dialog box, double-click the appropriate line in the **Phone Numbers** list. The related Phone Number dialog box opens.



2. Enter the phone number, Internet address, or other destination by selecting the dialing service on the **Call using** drop-down list and then entering the number in the field below the list. See “Entering a phone number by using a dialing service” on page 11-5 for more information.
3. You can enter a short description of this phone number in the **Description** field. This is a good place to enter extensions.
4. Check **This number is the contact’s default** if this is the phone number you dial most frequently to reach the contact. The number you choose as the default is slightly faster to select when placing calls.
5. Check **Use this number as caller identification for this contact** if you want Strata CS to identify calls from this number as calls from the contact. If this option is unchecked, calls from this number appear in the Call Monitor and Call Log views as being from “Unknown.”

   Note: Checking this box adds the phone number to the contact’s Incoming Caller ID list. See “You can teach Strata CS to recognize contacts when they call.” on page 15-8 for an explanation of the list.

6. Click **OK** to close the Phone Number dialog box.

7. To enter more phone numbers for this contact, repeat steps 1-6 for the other categories in the phone number list.
8. Click **OK** to close the Contact dialog box. The new contact now appears in the Contacts view.

To record a voice title for a contact

1. In the Contacts view, select the contact for whom you want to record a voice title and choose **File > Open**.
2. In the Contact dialog box, click the Caller Identification tab.
3. Record the voice title by using the audio controls. See “Using the audio controls” on page 7-22 for instructions.
4. Click **OK**.

Notes:

- Strata CS can play contacts’ voice titles over your computer speakers automatically when they call. See “Customizing incoming call behavior” on page 18-9 for more information.
- Strata CS can also capture contacts’ names in their own voices when they respond to the call announcing prompt and use those recordings as contacts’ voice titles. See “To associate a call with a contact” on page 15-10 for more information.

Sharing your contacts

You can share any of your contacts folders with other Strata CS users. Those users can access your contacts folders from their folder lists according to access levels that you specify. You can grant individual users specific levels of access to your contacts.

For instructions, see “Sharing views and folders” on page 7-19.

Teaching Strata CS to recognize your contacts

Strata CS’s more advanced features depend on Strata CS recognizing your contacts. You can teach Strata CS to recognize your contacts in the following ways:

- Using call rules and routing lists to customize how calls from the contact are handled (see Chapter 16 and Chapter 14, respectively).
- Strata CS can identify whenever the contact calls—from any phone number or if caller ID is not available. See “Using contact PINs for guaranteed recognition” on page 15-12.

- Using the contact’s name, rather than the caller ID name (see “You can teach Strata CS to recognize contacts when they call.” on page 15-8 and “Associating a call or caller ID number with a contact” on page 15-10)

Note: Strata CS automatically identifies other Strata CS users when they call.

The benefits of having Strata CS recognize contacts include:

- Their names appear in the Call Monitor view while the phone is ringing to let you know who is calling.
- Their names appear in the Call Log and Voice Messages views, so that you can easily see contacts in your phone record and call them back.
- You can use call rules to set up individualized call handling for them, such as playing a unique voice-mail greeting or routing their calls according to a specific routing list (see Chapter 16).
- Their names are displayed on your caller ID phone, if you have one.
- You can exempt them from the Do Not Disturb personal status, so that their calls ring your phone when others are sent directly to voice mail.

One form of identification, caller ID from the phone company, is available automatically for every call. The phone number and caller ID name of the caller appear in the Number column of the Call Monitor, the Call Log, and the Voice Messages views.

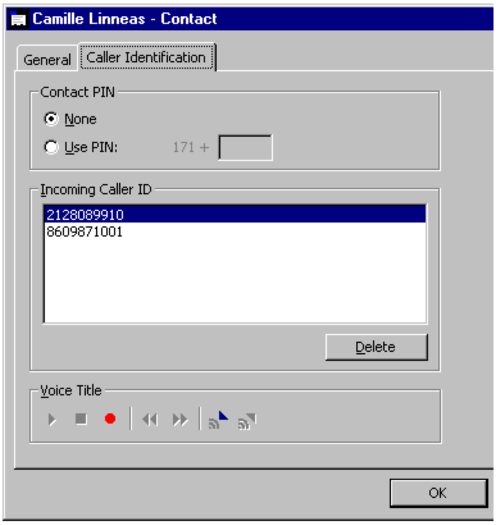
You can teach Strata CS to recognize contacts when they call.

Identifying contacts by name

Each contact has a list of associated phone numbers called the Incoming Caller ID list. When a call arrives from one of those phone numbers, Strata CS identifies that contact.

The Incoming Caller ID list can include caller ID names as well as phone numbers. See “Understanding name and number on caller ID” on page 15-12 for pointers on which item is more useful for identifying a given contact.

To view a contact's Incoming Caller ID list, select the contact, choose **File > Open**, and then click the Caller Identification tab.



To guarantee that Strata CS recognizes contacts, regardless of the phone number from which they are calling, use a contact PIN. See "Using contact PINs for guaranteed recognition" on page 15-12 for more information.

Adding phone numbers for contact recognition

You can add a phone number to a contact's Incoming Caller ID list by doing one of the following:

- Add a new phone number for the contact in the General tab and check **Use phone number as caller identification for this contact**. See "Entering a new contact" on page 15-4 for more information.
- Associate the phone number from a call or voice message with the contact. See "Associating a call or caller ID number with a contact" on page 15-10 for more information.

Deleting a number from the Incoming Caller ID list

If Strata CS wrongly identifies a contact as the caller, it is likely that the Incoming Caller ID list for that contact includes an incorrect phone number. You can prevent further misidentification by deleting the phone number from the list.

1. Double-click the contact from whom you want to delete a phone number. The Contact dialog box opens.
2. Click the Caller Identification tab.
3. In the **Incoming Caller ID** list, select a phone number.

4. Click **Delete** and then click **OK**.

Associating a call or caller ID number with a contact

If Strata CS shows a caller's name as "Unknown," but you know who the caller is, you can associate the call with one of your contacts. Doing this replaces "Unknown" with the contact's name.

You also can associate the caller ID number or the name from the call with a contact. Doing this adds the number to the contact's Incoming Caller ID list. Future calls from that phone show that contact as the caller. In this way you can "teach" Strata CS to recognize the people who call you.

For example, the following illustration shows a voice message before association, showing "Unknown" as the caller.

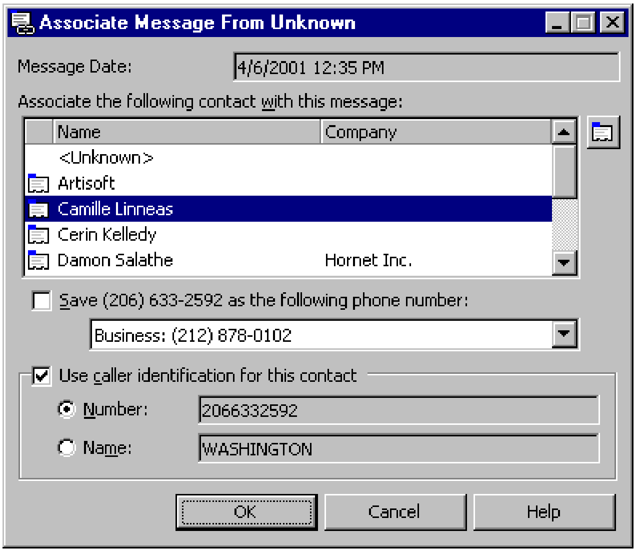
The next illustration shows the same message after you associate it with your contact Miri Anatolia.

You can teach Strata CS to recognize a caller by caller ID name instead of the phone number. This can be useful, for example, if the contact calls from a company with a PBX that randomly assigns phone numbers to trunks but uses a caller ID name that remains the same.

To associate a call with a contact

1. Click one of the following:
   - An active call in the Call Monitor view
   - An entry for a call in the Call Log view
   - A voice message in the Inbox folder of the Voice Message view

2. Click  on the toolbar. The Associate dialog box opens.



3. Select the contact in the list with whom you want this phone number associated. If you want to cancel an association and revert the call to "Unknown," click "<Unknown>."

   To create a new contact directly from this dialog box, click . (See "Entering a new contact" on page 15-4 for instructions.) When you finish creating the contact, you return to this dialog box with the new contact added to the list.

4. If the call came from a phone number that is new for this contact, you can add the new number to the contact's phone number list now. You can then dial it later from the Client. Check **Save <phone number> as the following phone number**, and then select the phone number category on the drop-down list.

5. If you are associating an active call in the Call Monitor view, you can create a voice title for the contact based on the recording of the caller's name.To create a voice title in this way, check **Use this voice title**. You can test the recorded name by clicking the button to the right of the field.

   Note: This field is available only if there is a recorded name available to capture.

6. If you want only to label the individual call or voice message with the contact's name, uncheck **Use caller identification for this contact**.

   If you want Strata CS to associate all subsequent calls from that phone with the contact, check **Use caller identification for this contact** and

select one of the following:

- **Number.** Strata CS uses the phone number to recognize subsequent calls.
- **Name.** Strata CS uses the caller ID text to recognize subsequent calls.

See the next section for more information.

7. Click **OK**.

You cannot associate a phone number or Caller ID text with a public contact unless you have permissions to edit public contacts. You can, however, label an individual call as being from a public contact.

Understanding name and number on caller ID

When you receive a call, Strata CS receives two pieces of information about where the call originated: the phone number and the caller ID name. You can associate either of these items with a contact.

Depending on where the call originated, one item may work better than the other, as the following examples illustrate:

- **If the call is from a home phone** (for example, `ANTANDER,LOU - 6178380405`). In this case, where both the number and name are unique, either could be used for association.
- **If the call is from an office extension** (for example, `Toshiba - 6175641121`). In this case the phone number may change with every call, because the office's PBX system uses a random trunk for outgoing calls. The caller ID name, however, remains constant, so you should use that for association.
- **If the call is from a standardized caller ID name** (for example, `california - 7605550807`). In cases where the caller ID name is standardized for many different phones, you should use the phone number for association.

Using contact PINs for guaranteed recognition

Contact PINs provide a guaranteed way for callers to be recognized by Strata CS whenever they call. A contact with a PIN can call from any phone number and be identified by Strata CS.

Contact PINs are unique numbers that you give out to contacts. Contacts add their PINs to your extension when they call you.

Examples:

- Your extension is 177, and you give Mr. Jones a contact PIN of 55. Mr. Jones calls your office, and when prompted to enter your extension, he types in 17755. Strata CS is thus assured of identifying this call as coming from Mr. Jones.
- If you have a car for sale, you could advertise it in the paper with your extension plus a contact PIN (for example, “Call me at ext. 17756”). Set up the contact as “Car buyer” with a PIN of 56. Now when anyone calls about the ad, it appears as from “Car buyer” in your Call Monitor.

To enter a contact PIN

1. In the Contacts view, double-click the contact for whom you want to create a contact PIN. The Contact dialog box opens.
2. Click the Caller Identification tab.
3. Under **Contact PIN**, enter the number that you intend to give to this contact. If the contact PIN you entered conflicts with one already created, Strata CS prompts you to enter a different number.
4. Click **OK**.

Note: You cannot enter a contact PIN for a public contact.

Using workgroups

A workgroup is a group of related extensions or contacts. Extensions in Strata CS include users, IVR Plug-ins, auto attendants, or queues. With a workgroup you can:

- Send, reply, or forward a voice message to the workgroup. All users in the workgroup receive the message at once. See “Broadcasting voice mail” on page 12-12.
- Create a call rule for the workgroup. Incoming calls from any member of the workgroup are handled according to the call rule. For example, you can have a custom voice-mail greeting that plays for all the members in your “VIP group.” See Chapter 16 for more information.
- Share your voice mailbox or contacts with the workgroup. See “Sharing views and folders” on page 7-19.
- Call the workgroup. The phones of all users in the workgroup ring simultaneously, and the first user to answer is connected. See “Placing a call” on page 11-2.
- View users by workgroup when transferring calls, which makes it easier to pick the right recipient. Each workgroup appears as a tab in the Transfer To dialog box. For example, you can define the members of your Sales

department as a workgroup. Then, if you have to transfer a call to Sales, you can click the Sales tab and see all the members of Sales at a glance, along with their current personal statuses. See "Transferring a call" on page 10-9.

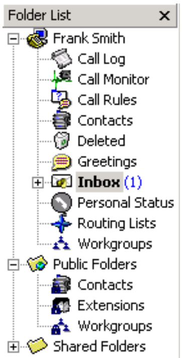
- Quickly answer any ringing phone in your workgroup by picking up your phone and pressing ***99**. See "Answering a call at another ringing phone" on page 4-4.
- Create a routing list that distributes calls to the members of a workgroup according to the distribution algorithm you choose. Strata CS system administrators use this feature to set up ACD workgroups. See "Routing calls to workgroups" on page 14-13. For information on setting up ACD workgroups, see the manual *Strata CS Call Center Administrator Guide*.

Personal and public workgroups

Generally, the workgroups you will create in Strata CS are *personal* workgroups. Only you can see the personal workgroups that you create. Other users cannot see workgroups that you create.

Public workgroups, which are accessible by all Strata CS users who have permission to see them, can be created only by administrator users or other users who have been given special permissions to do so.

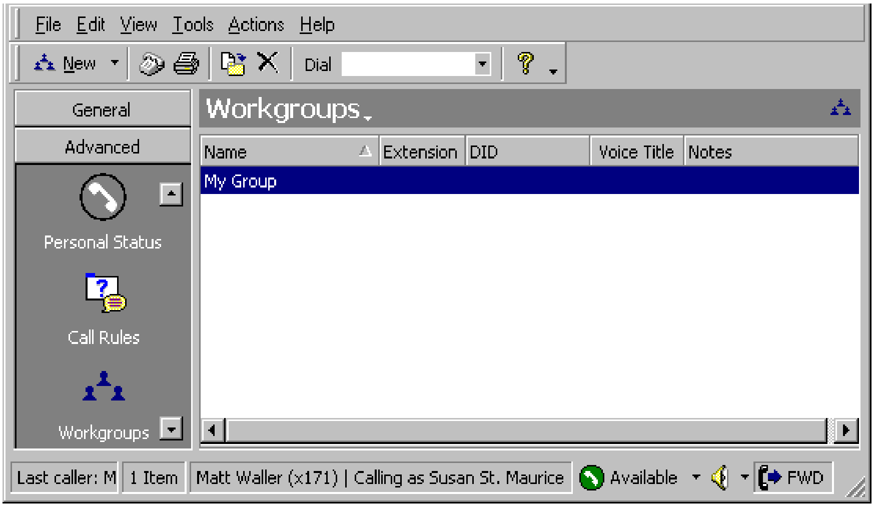
To view the public workgroups in your office, click the plus sign next to Public Folders in the folder list and click Workgroups. See "Using the Folder List" on page 7-16.



Note: You can create or edit public workgroups only if your Strata CS system administrator has given you permission to do so.

The Workgroups view

The Workgroups view displays your personal workgroups. Click **Advanced** in the view bar to locate the button for the Workgroups view.

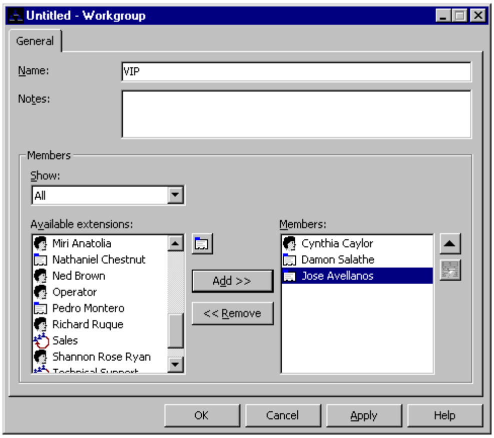


Creating a workgroup

1. Do one of the following:

- To create a personal workgroup, open the Workgroups view.
- If you have the permissions to create a public workgroup, open Public Folders in the folder list and click Workgroups. You can only create a public workgroup if your system administrator has given you permission to do so.

2. Choose **File > New > Workgroup**. The Workgroup dialog box opens.



3. Enter a **Name** for the workgroup and any **Notes** to describe the workgroup.

4. Add one or more members to the workgroup by selecting names on the list of **Available Extensions** and then clicking **Add**. Press CTRL to select multiple names on the list. The members you selected appear in the **Members** list. Use the arrows next to the list to arrange the order of the members. Click **Remove** to delete members from the list.

   Note: The order of the workgroup is important only if you have set up a routing list to route calls to it according to the Top down or Round robin algorithms. See “Routing calls to workgroups” on page 14-13.

5. Click **OK**.

Calling a workgroup

You can call all of the users in a workgroup simultaneously. The phones of all users in the workgroup ring, and whoever accepts the call first is connected to you. This method of calling can be handy if you must reach someone in a group and if it does not matter who answers.

To call a workgroup, dial the workgroup’s extension (if it has one) or double-click the workgroup in the Extensions view.

CHAPTER 16

USING CALL RULES

CHAPTER CONTENTS

About call rules

Strata CS call rules enable you to handle specific incoming calls differently than other calls. For example, you can create a call rule for your friend Jim so that he is routed to your cell phone and hears a special voice-mail greeting whenever he calls.

Call Rules overview

To create a call rule, you determine two things:

- Which incoming calls activate the call rule
- How the call rule handles those calls

Distinguishing which incoming calls activate the call rule

You can distinguish which incoming calls are handled by a call rule based on the following conditions:

- **Caller condition.** The rule activates depending on who is calling. In addition to having call rules for individual callers, you can have call rules that apply to all internal callers, all external callers, all unidentified callers, or any member of a workgroup.
- **Schedule condition.** The rule activates depending on when the call arrives. You can handle calls differently during business hours, after business hours, and at specific dates or times.

You can use caller and schedule conditions in combination to achieve various effects. See “Combining caller and schedule conditions” on page 16-5.

Determining how the call rule handles calls

A call rule can handle incoming calls according to any combination of the following settings:

- **Personal Status.** You can select a personal status and have the call handled as if that personal status were in effect.
- **Greeting.** You can choose which greeting plays if the caller reaches your voice mail.
- **Routing List.** You can choose which routing list a call follows.
- **Taking calls.** You can specify whether your phone does or does not ring.

A call rule’s settings for greeting, routing list, and whether you are taking calls overrides the settings of the personal status specified by the call rule.

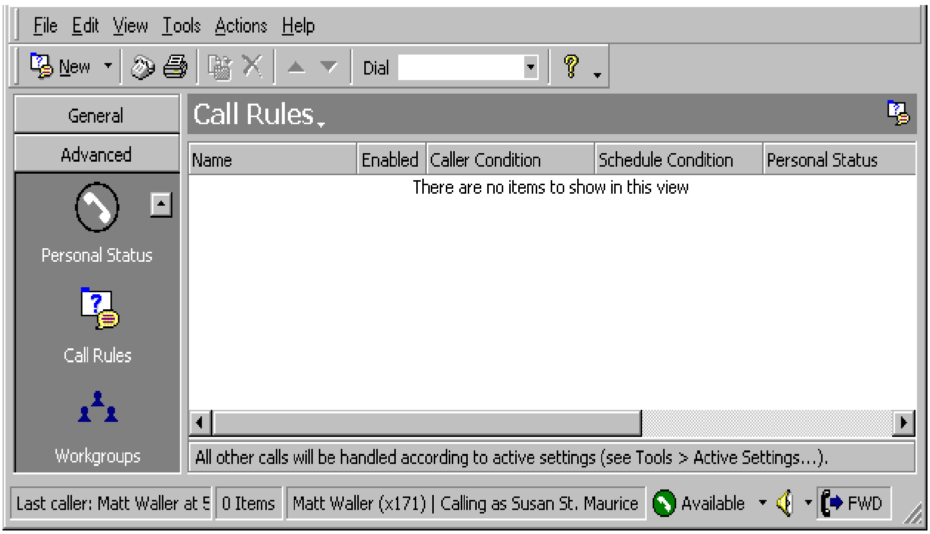
Example: A call rule uses the "Standard" greeting. It also uses the Out of the Office personal status, which uses the "Be back tomorrow" greeting. When the call rule handles a call, the "Standard" greeting is the one used.

Examples of how you can use call rules

- Calls from your "Friends" workgroup can follow a routing list that tries you at several locations in the office during business hours.
- During your lunch hour, you can have a special "At lunch" greeting that plays to callers before sending them to voice mail.
- You can have the Do Not Disturb personal status turn on automatically every day at 6:00 pm, but only for internal callers.
- You can create a contact called "Nuisance Callers" and associate the phone numbers of solicitors with that contact. Those callers can follow a routing list that plays a greeting and then hangs up without ringing your phone. The greeting can say, "I'm sorry. I don't accept calls from solicitors during business hours."

The Call Rules view

Click **Advanced** in the view bar to locate the button for the Call Rules view.

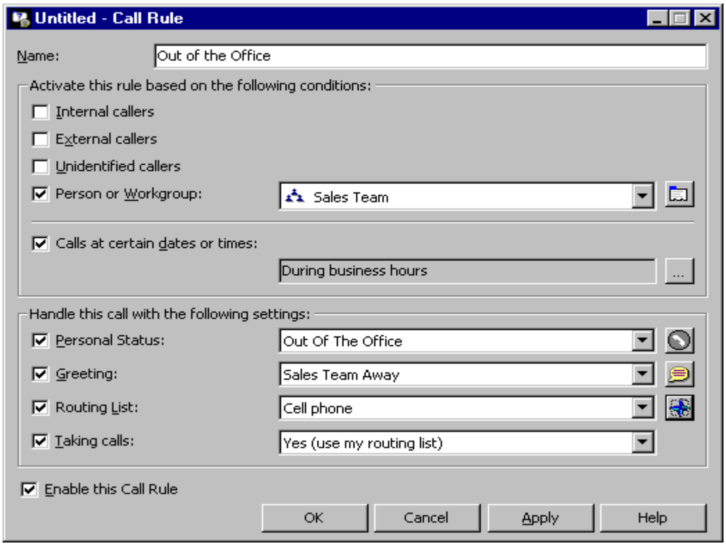


Creating a new call rule

The following procedure provides an overview of creating a call rule. The following sections give detailed instructions for choosing caller conditions, schedule conditions, and call handling options.

To create a new call rule

1. Choose **File > New > Call Rule**. The Call Rule dialog box opens.



2. Enter a name for the call rule in the **Name** field.
3. Select one or more caller conditions. See “Setting caller conditions” on page 16-5.
4. Select a schedule condition. See “Setting schedule conditions” on page 16-5 for more information.
5. Select one or more settings to specify how the rule handles calls. See “Selecting how a call rule handles a call” on page 16-8 for more information.
6. If you do not want this call rule to be active, uncheck **Enable this Call Rule**. The call rule remains in storage, but does not handle any calls until you enable it again. See “Enabling or disabling a call rule” on page 16-8.

   If you want the call rule to be active, leave this field checked.
7. Click **OK**.

Combining caller and schedule conditions

When creating a call rule, you can specify only caller conditions, only schedule conditions, or both conditions together, with the following results:

- **Only caller conditions.** The call rule is always active, and handles calls that meet its caller conditions at all times. For example, a call rule for your friend Jim activates whenever Jim calls.
- **Only schedule conditions.** The call rule handles all incoming calls during the specified dates and times. For example, a call rule for after business hours (with no caller conditions set) handles all calls after business hours.
- **Both caller conditions and schedule conditions.** The call rule handles calls only when both conditions are met. For example, a call rule for your friend Jim after business hours handles only calls from Jim that occur after business hours. If Jim calls during business hours, the call rule does not activate. Likewise, if anyone other than Jim calls after business hours, the call rule does not activate.

Setting caller conditions

Under **Activate this rule based on the following conditions**, check the types of callers to whom you want the call rule to apply. If you select more than one caller condition, the call rule will apply if any caller condition is met. For example, selecting internal callers and your Friends workgroup will activate this call rule if any internal user or any member of the Friends workgroup calls.

You can select one or more of the following caller conditions:

- **Internal callers.** Strata CS users.
- **External callers.** Callers from outside of your Strata CS system.
- **Unidentified callers.** Callers from outside of your Strata CS system who are also not identified as contacts.
- **Person or Workgroup.** A specific user, contact, or workgroup. Select the item from the drop-down list.

  To create a new contact or workgroup, click . To edit the current contact or workgroup, ALT-click . See "Entering a new contact" on page 15-4 and "Creating a workgroup" on page 15-15.

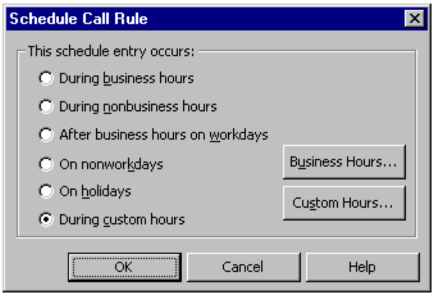
Setting schedule conditions

To make the call rule active during certain dates or times only, check **Calls at certain dates or times**.

If **Calls at certain dates or times** is unchecked, the call rule is always active and will handle incoming calls that meet its caller conditions at all times.

To set a schedule condition

1. Check **Calls at certain dates or times**.
2. Click or double-click in the schedule text box. The Schedule Call Rule dialog box opens.



3. Under **This schedule entry occurs**, choose an option for when the call rule activates. Choose one of the following two options:
   - Dates and times based on your office's business schedule. All options other than **During custom hours** are based on your office's business schedule.

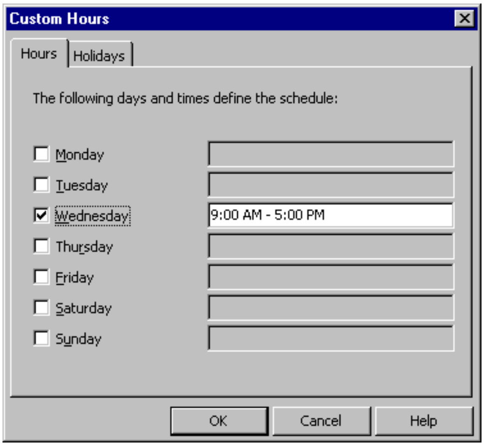
     To view your office's business schedule, click **Business Hours**. More than one business schedule may be available, in which case you can choose which schedule to use. Note that if you change your business schedule, it affects all other items scheduled through the Client, such as your schedule for e-mail and pager notification of new voice messages (see "E-mail and pager notifications" on page 12-4).
   - Dates and times that you define. Click **During custom hours**. See the next section for instructions.
4. Click **OK**.

Specifying custom hours

If you selected **During custom hours** as your schedule condition, follow these procedures to specify when the call rule activates.

To have the call rule activate on a daily or weekly basis

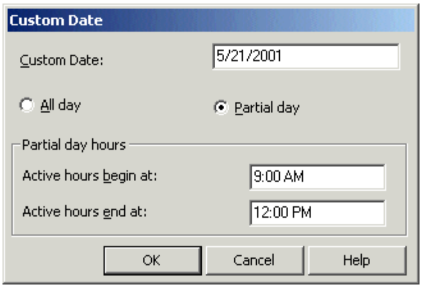
1. Click **Custom Hours**. The Custom Hours dialog box opens.



2. Check the days for which you want to set custom hours.
3. Replace the default times with the hours you want, next to the selected days. The call rule will be active during these hours.
4. Click **OK**. The call rule will be active during the days and times specified.

To have the call rule activate on an individual date

1. Click **Custom Hours**, and then click the Holidays tab.
2. Click **Add**. The Custom Date dialog box opens.



3. Enter a **Custom Date** in the format mm/dd/yyyy.
4. To schedule this rule for the whole day, accept the default of **All day**. Select **Partial day** if you want to set specific hours.

5. If you select **Partial day**, enter the **Active hours** for the day.
6. Click **OK** when you are finished setting the schedule. The call rule will be active during the specified hours on the specified date.

Selecting how a call rule handles a call

Calls are normally handled with your active settings, such as your standard greeting and routing list. Call rules override one or more of these settings to handle calls in different ways.

Under **Handle calls using the following settings**, check any combination of the following options. Note that you must check at least one option, or your call rule will do nothing.

- **Personal Status.** Select a personal status. Calls handled by the call rule will be handled as if that personal status were in effect. Note that the call rule's own settings for greeting, routing list, and phone override the personal status' preferences.
- **Greeting.** Select a greeting. Callers handled by the call rule will hear that greeting if they reach your voice mail.
- **Routing List.** Select a routing list. Calls handled by the call rule will follow that routing list.
- **Taking calls.** Select whether or not calls handled by the call rule ring your phone.

You can click the buttons next to **Personal Status**, **Greeting**, and **Routing List** to create a new item of each type. Press ALT and click a button to edit the currently selected item.

Enabling or disabling a call rule

You can enable or disable existing call rules. Disabled call rules remain in storage, but do not handle any calls until you enable them again.

To enable or disable a call rule

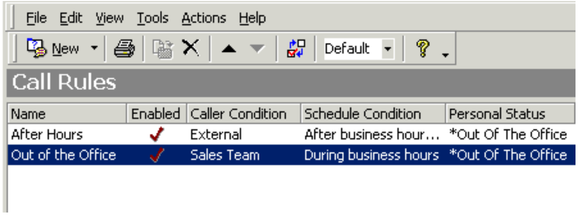
1. In the Call Rules view, select the call rule that you want to enable or disable.
2. Choose **Actions > Enabled** from the menu bar.

Enabled call rules are marked with  .

Choosing the priority of a call rule

Strata CS handles incoming calls according to the priority of your call rules. The call rules in the Call Rules view are ordered from the top down. The first rule in the list has the highest priority.

You can create multiple call rules that contain similar caller and schedule conditions, and then prioritize them to ensure that the correct greeting and routing list are used for calls. For example, if you create a call rule for a workgroup, but want calls from a certain individual within that workgroup to be handled differently, you can create a call rule for that individual and give it a higher priority than the workgroup's call rule.



To set the priority of a call rule

1. Select a call rule in the Call Rules view.
2. Click or on the toolbar to reposition the rule.

Note the following items when you set the priority of call rules:

- If a call is referenced by two rules, the call rule that is ordered higher in priority takes precedence.
- If you create a call rule for an individual caller, and that person also belongs to a workgroup for which you have a call rule, the rule with the higher priority overrides the other rule. Therefore, you should prioritize call rules for individual callers higher than call rules for workgroups.
- When a call is referenced by multiple rules, individual settings (personal status, greeting, routing list, or phone) are determined by the highest priority rule in which the setting is not blank. If the highest priority rule has a setting with an instruction, that setting is used. But if it has another setting that is blank, while a lower priority rule has an instruction for that setting, the setting from the lower priority rule is used. This can result in settings from different call rules being used on a single call. See the example that follows.

  Example: You create a call rule for your friend Paul that will be in effect during business hours. In that call rule, you choose a custom greeting for him to hear and a routing list that rings your cell phone. You choose to

leave the personal status and phone settings blank. If Paul also belongs to the Sales workgroup for which you have a lower-priority call rule, and that call rule specifies a personal status and phone state, calls from Paul are handled in the following way:

- **Personal Status.** The Sales workgroup's personal status setting from the Sales workgroup's call rule is used, because no personal status is specified in Paul's call rule.
- **Greeting.** The custom greeting you created for Paul is used.
- **Routing List.** Calls from Paul ring your cell phone, as specified in Paul's call rule.
- **Taking calls.** The behavior specified in the call rule for the Sales workgroup is used, because no **Taking calls** setting is specified in Paul's call rule.

Ignoring all call rules

If you create routing lists and call rules, Strata CS handles your incoming calls according to those settings and rules. There can be times, however, when you want Strata CS to ignore those rules.

You can set Strata CS to use the Standard routing list and ignore your call rules by choosing **Tools > Ignore Call Rules**. The check mark indicates that **Ignore Call Rules** is turned on. All call rules are then ignored and all incoming calls ring at your Where I Am phone number (your extension, unless you have changed it with call forwarding or a personal status). If there is no answer, the caller is sent to voice mail. Any settings specified by your call forwarding, personal status, or active settings are still in effect.

Example: You have set up a routing list that tries you at various phones around the office. Now you are taking a trip out of town and you want all calls forwarded to your hotel. Use call forwarding to forward your calls to the hotel, and then turn **Ignore Call Rules** on to make sure your calls do not get sent around the office while you are away.

When return to your office and you turn off **Ignore Calls Rules**, Strata CS again enforces all of your routing lists and call rules.

CHAPTER 17

WORKING AS A CALL CENTER AGENT

CHAPTER CONTENTS

Whether this chapter applies to you

This chapter provides instructions for working as an agent in a Strata CS call center. Whether or not this chapter applies to you depends on the Strata CS call distribution method that your office uses, as follows:

- **Use this chapter** if you are an agent in a Strata CS call center queue that was set up by using the separately purchased Strata CS call center add-on.
- **Do not use this chapter** if you are an agent in a Strata CS ACD workgroup that was set up by using an ACD workgroup user and a routing list that sends calls to agents who are members of a workgroup. If you are an agent in an ACD workgroup, see the manual *Strata CS Call Center Administrator Guide* or your Strata CS system administrator for instructions on working as an agent.

For instructions on setting up, managing, and supervising a call center, see the manual *Strata CS Call Center Administrator Guide.*

About call centers

A call center is a method of placing incoming calls on hold and distributing them to a group of users. Users in call centers are called *agents*. Typical examples of a call center are a sales office or a technical support department.

Basic call center terminology

The following Strata CS call center terms appear in this chapter:

- **Agent.** A Strata CS user who answers incoming calls to the call center.
- **Queue.** A call center that is set up at a single extension. Callers to that extension who are waiting on hold are said to be "in the queue." A call center can have more than one queue. For example, a technical support department can have one queue for Product A and another queue for Product B. Each queue has its own list of agents who answer calls and its own method of distributing calls to agents. You can be an agent for more than one queue.
- **Supervisor.** An agent who has special permissions. Supervisors can perform administrative maintenance on a queue by using the Strata CS Administrator application, and they can view current queue statistics. Agents can have varying levels of supervisor permission. If you have supervisor permissions, see the manual *Strata CS Call Center Administrator Guide* or your Strata CS system administrator for further information.
- **Overflow agent.** A user who answers calls to a queue only when all the queue's regular agents are unavailable.

- **On call.** Whether an agent is currently active in a queue. Agents can be members of a queue but not currently on call, in which case the queue does not forward calls to them. Supervisors or system administrators determine whether an agent is on call for a queue.

Signing in, signing out, and taking breaks

You sign in to begin your shift as a call center agent, and you sign out when you are done. When you sign in, you begin receiving calls from all queues for which you are on call. When you sign out, queues stop sending calls to you.

If you have to leave your phone during your shift, choose Strata CS's On Break personal status.

You can sign in and out and take breaks either by using the telephone commands or by changing your personal status in the Client. For instructions on changing your personal status, see "Selecting a personal status" on page 8-6.

Note: To see whether you are on call for a given queue, open the Extensions view in the Client and click the tab for that queue. If your name is on the list, you are on call for that queue. Talk to your supervisor or system administrator if you want to change which queues you are on call with.

Signing in

To sign in, do either of the following:

- Pick up your phone and press ***51**.
- In the Client, select the personal status **Available (Queue Only)**.

When you sign in by using one of these methods, you receive queue calls only. Non-queue calls are sent directly to your voice mail without ringing your phone. To have all your calls ring your phone, sign in by choosing the **Available** personal status.

Signing out

Important: Sign out at the end of your shift only. To take a break during your shift, use the **On Break** personal status to ensure the integrity of call center statistics. See the next section, "Taking a break."

To sign out, do either of the following:

- Pick up your phone and press ***52**.
- In the Client, select the personal status **Available (Non-Queue)**.

Important: If you have used the ***14** command to mark your outbound calls as being from the queue, you must pick up the phone and press ***14#** to mark your

subsequent outbound calls as being from yourself. Otherwise your outbound calls will continue to be marked as coming from the queue, even though you have signed out. See "Placing calls from a queue" on page 17-7.

When you sign out by using one of these methods, you continue to receive non-queue calls, but you receive no queue calls. You can also sign out by choosing any personal status other than **Available**, **Available (Queue Only)**, and **On Break**. For example, choosing **Do Not Disturb** signs you out of the queue and also sends non-queue calls directly to voice mail.

Taking a break

To take a break from answering queue calls during your shift, do one of the following:

- Pick up the phone and press ***53**.
- In the Client, select the personal status **On Break**.

Important: Select the On Break personal status whenever you leave your phone during your shift, even for a short time. If you leave your phone without selecting On Break, queue calls might be sent to your phone, and callers will hear an interval of ringing before they are placed back on hold. Note that if you do not answer calls to your phone, the queue might automatically place you in On Break status.

When you finish your break and are ready to receive calls again, you must sign in again—even though you have not signed out. Press ***51** on your phone or select the personal status **Available** or **Available (Queue Only)**. See "Signing in" on page 17-3.

Note: Signing in at the beginning of your shift and returning to work after a break are the same process.

Signing in at another extension

To sign in to a queue at an extension other than your own, do the following:

1. Forward your calls to the new extension. See "Forwarding calls" on page 14-2 for instructions.
2. Log on to your account so that Strata CS knows which agent you are. Otherwise, your call center performance might be logged under another agent's name. You can log on to your account by using either the Client or the telephone.
    - **To log on using the Client:** Start the Client and log on by using your user name and password. If the Client is already running under someone else's account, choose **File > Log on as another user**, and then log on by using your user name and password.

- **To log on using the telephone:** Pick up the phone and dial **# <your extension> # <your password> #**.

3. After you have logged on, sign in as described in “Signing in” on page 17-3.

Receiving and handling queue calls

You can receive and handle queue calls by using either the telephone commands or the Client. When the queue sends a call to you, your phone rings and the call appears in the Client’s Call Monitor view.

To answer a call, do either of the following:

- Pick up the phone. Note that the call announcing settings for your own account do not apply to queue calls. When you answer a queue call, you are connected directly with the caller. For information about call announcing, see “Call announcing” on page 4-2.
- Click the incoming call in the Call Monitor and choose **Actions > Take Call**. If your phone is on-hook, it rings to connect you to the call.

Note: If you do not answer an incoming queue call that rings your phone, the queue forwards the call to the next available agent.

After you are connected to a queue call, you can use any Strata CS call-handling features such as transfer, park, mute, and so forth. For instructions on handling calls by using the phone, see Chapter 4. For instructions on handling calls by using the Call Monitor, see Chapter 10.

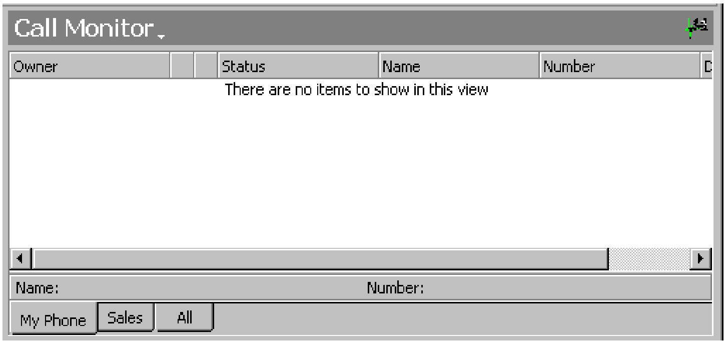
Using the Call Monitor tabs

When you are an agent in a call center queue, your Call Monitor view displays the following tabs:

- A tab that shows the queue’s calls, with the name of the queue on it

  Note: You must have permission to see the queue tab. If you do not see it, see your Strata CS system administrator.

- The My Phone tab, which shows all the calls that are being handled by your phone, including any queue calls you have taken
- The All tab, which shows all your queue and personal calls together



If you are an agent in multiple queues, the Call Monitor displays a tab for each queue.

Click the My Phone tab or a queue tab to view only the calls for that tab. Click the All tab to view all calls at once.

Note: Your Call Monitor view may display other tabs than the ones described in this section. See “Call Monitor view tabs” on page 10-4.

Wrap-up time

After you finish a queue call, you are given wrap-up time to complete any work relating to the call. During your wrap-up time you will not receive any queue calls. Your system administrator sets how much wrap-up time you have, by default 15 seconds.

While you are in wrap-up time, the wrap-up icon appears in the Client status bar:

Terminating your wrap-up time early

To terminate your wrap-up time early, and mark yourself as available to take queue calls again, do either of the following:

- Click  in the Client status bar.
- Pick up your phone and press ***54**.

Placing calls from a queue

If you are a call center agent and you place a call at your desk using the telephone or the Client, by default Strata CS marks the call as a call made by you. However, you may need to place outgoing calls as part of your work as a call center agent. Such calls in Strata CS can be marked as calls from the queue—not as calls from your extension—so that reports on queue activity accurately reflect agent performance.

Marking all calls

To mark all subsequent outbound calls as queue calls, pick up your phone and press ***14<queue's extension>#**. All calls that are made from your station are now logged as calls that are made by the queue and the calls appear in the Call Logs and Call Monitors of all call center agents in the queue. The calls do not appear on the My Phone tab in your Call Monitor.

To switch back, and mark subsequent outbound calls as being from you, press ***14#**. All subsequent calls from your station are now marked as being placed by you. These calls appear only in your Call Monitor and only in your Call Log.

Important: When you mark all your calls as being from the queue, they continue to be marked as being from the queue—even after you sign out—until you reset them by pressing ***14#**. When you are done placing outbound queue-related calls, you must press ***14#** to reset your subsequent calls as being from yourself.

If you share a station, log into Strata CS and then mark your calls.

Finding out how calls are currently marked

To learn how outbound calls from a station are currently marked, pick up the station and press *0. The station information recording includes the line, "The default extension is **<Ext.>** calling as **<Name>**."

- **<Ext.>** is the extension of the last user who logged in at the station.
- **<Name>** is the person or queue that outbound calls are marked as being from.

For example, the recording might say, "The default extension is **555**, calling as **Sales Queue**."

The Client's status bar also displays whether outbound calls are marked as being from someone else. See "The status bar" on page 7-7.

Popping up caller information

You can use the Strata CS Contact Manager Assistant to pop up information about callers that you have in another contact manager application. Callers must be contacts in one of the following contact manager or customer relationship management applications:

- Microsoft Outlook 98 or 2000
- GoldMine Software’s GoldMine 4.0 or 5.0
- GoldMine FrontOffice 2000

For instructions on configuring the Strata CS Contact Manager Assistant, see its online Help.

Act! does not require the Contact Manager Assistant to pop up contact information.

Note: Your office might also use a custom screen pop application created with the Client API. If this is the case, see your Strata CS system administrator for instructions on using it.

What call center agents need to know to get the job done

If you are working as a call center agent, you should be aware of the following:

- **While you are signed in, always take queue calls that are sent to you.** If a queue call rings your phone and you do not answer, the caller hears an interval of ringing before being placed back on hold. Also, if you do not pick up a ringing queue call, or decline it using the call announcing options, the queue might automatically place you On Break.
- **Sign out only at the end of your shift.** To stop receiving queue calls during your shift, for any reason, use the On Break personal status. Many performance statistics for the queue reset when you sign out. If you sign in and out several times during the day, those statistics are affected.
- **Your personal status can be changed by others.** If you do not answer queue calls that ring your phone, the queue can automatically place you On Break. Also, a supervisor can change your personal status at any time.

Working remotely

By forwarding your calls, you can work as an agent at a remote phone, for example your home phone. For instructions on using the Client remotely, see “Using the Strata CS Client remotely” on page 6-5.

CHAPTER 18

CUSTOMIZING YOUR CLIENT

CHAPTER CONTENTS

About customizing your Client

You can customize the Client and your Strata CS account to suit the way you work.

The customization options presented in this chapter are set in the Options dialog box. Your Strata CS system administrator may have made some or all tabs of the Options dialog box unavailable to you. See your Strata CS system administrator if you cannot access a particular option that is described in this chapter.

You can customize the Client by specifying the following items in Strata CS:

- Telephone behavior (see page 17-2)
- Incoming call behavior (see page 17-8)
- Voice message behavior (see page17-8)
- The extension for Operators (see page 17-9)
- The Client display (see page 17-10)
- Other options (see page 17-12)

Customizing telephone behavior

The options described in this section allow you to customize your interaction with Strata CS on the phone. These options include:

- Recording a voice title
- Changing the language of telephone command prompts
- Customizing call announcing
- Customizing call waiting
- Turning ringback for calls on hold on and off
- Changing your personal Operator
- Customizing your listing in the dial-by-name directory
- Customizing how long and in what pattern your phone rings

Recording a voice title

A voice title is a short recording of just your name that Strata CS fits into its own recorded prompts. For more information, and for instructions on recording a voice title on the phone, see “Recording your voice title” on page 2-2.

To record a voice title in the Client

1. Choose **Tools > Options**. The Options dialog box opens.
2. On the General tab, use the audio controls under **Voice Title** to record your voice title. See “Using the audio controls” on page 7-22 for more information.
3. Click **OK**.

You have a limited amount of space for your voice title, your contacts’ voice titles, your greetings, and recorded conversations. Ask your Strata CS system administrator how much space you have been allocated and how much you have used.

Changing the language of telephone command prompts

Strata CS can play the telephone command prompts in any language that was installed with Strata CS. Whenever you log in or press **Flash**, the prompts are played in the language you choose.

To change the telephone commands language

1. Choose **Tools > Options**. The Options dialog box opens.
2. On the General tab, select the language that you want on the **Telephone prompts** drop-down list. All languages that were installed with Strata CS appear on the list.
3. Click **OK**.

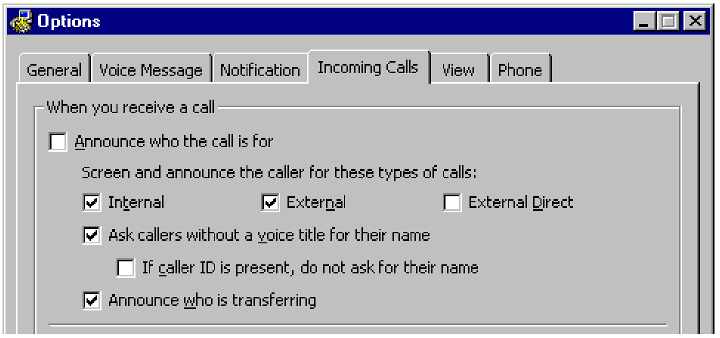
Customizing or turning off call announcing

Call announcing allows you to screen callers by using only your telephone. When you answer your ringing phone, you hear, “Call from,” followed by the name of the caller. You can then accept or decline the call. For detailed information about your options, see “Call announcing” on page 4-2.

The following procedure shows you several ways to customize call announcing. You can also turn it off entirely.

To customize call announcing or turn it off

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the Incoming Calls tab.



3. Under **Screen and announce the caller for these types of calls**, choose any of the following:
   - **Internal.** Calls from other Strata CS users.
   - **External.** Calls from external callers who choose your extension from an auto attendant or are transferred to you by another user.
   - **External Direct.** Calls from external callers who dial you directly. If you have a Direct Inward Dial (DID) number, or if a trunk line is routed directly to your extension, you may receive these types of calls. Ask your Strata CS system administrator about whether your phone is set up in either of these ways.

   To turn call announcing off for a type of call, uncheck it for that type. With call announcing turned off, you are connected directly to the caller when you answer your phone.

   Note: If your call announcing settings are different for internal and external calls, it can be helpful to set different ring patterns for internal and external callers (see “Changing ring patterns” on page 18-7). You can then tell by the ring pattern whether you will hear the caller or the call announcing prompt when you pick up the phone.

4. Use the following options in conjunction with call announcing:
   - **Ask callers without a voice title for their names**. By default, if have call announcing is turned on, contacts and users without voice titles are prompted to say their names. When you pick up the phone, you hear, “Call from,” followed by what they say. If you uncheck this field, callers are not prompted to say their names.

     With this field unchecked, when you receive a call from a caller without a voice title you will hear either “Call from internal user,”

"Call from external caller," or "Call from contact," depending on the caller.

- **If caller ID is present, do not ask for their names.** If checked, incoming callers with caller ID are not prompted to say their names. This is a useful setting if you have a phone with a caller ID display. You can skip asking the caller for a name if you can see on your caller ID display who is calling.

  If unchecked, all callers without voice titles are prompted to say their names.

- **Announce who is transferring**. Check this option if you want to hear the name of the person transferring a call to you. For example, if checked, you would hear "Helen Shire is transferring a call from Shane West." To announce who is transferring, you must have call announcing turned on for internal calls. If it is not turned on, you are connected directly to transferred calls.

- **Announce who the call is for**. If checked, when you answer your phone you will hear the recorded message, "Call for," followed by your voice title. This option is useful if two users share the same phone.

  You can use this feature alone or in conjunction with call announcing. When you use both features you will hear, "Call from <the caller's name> for <your voice title>," followed by the call announcing menu commands. Without call announcing, you are connected to the caller as soon as the "Call for" announcement plays.

5. Click **OK**.

Customizing or turning off call waiting

With call waiting turned off, incoming calls that arrive while you are on the phone go directly to the next step in your routing list (by default, the next step is your voice mail).

However, if call waiting is turned off, you can easily intercept an incoming call visually in your Call Monitor view. See Chapter 10 for more information.

To customize call waiting or turn it off

1. Choose **Tools > Options**. The Options dialog box opens.
2. On the General tab, under **Options**, check **Enable call waiting** if you want to use call waiting. Uncheck it if you want to turn call waiting off.
3. If you use the Client's Call Monitor view to alert you to incoming calls, and thus do not want the audible beep over the phone, check **Do not play**

call waiting beep when using Client. The beep will play only when you are not running the Client.

4. Click **OK**.

Note: If you have a multiline phone like the Strata CS DKT, turning off call waiting disables all Primary Directory Numbers except the one used by your current call.

Turning callback for calls on hold on and off

If you hang up with one or more calls on hold or parked, Strata CS can ring your phone to remind you of the calls. You can turn callback on and off, and you can specify how long Strata CS waits before ringing your phone.

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the General tab.
3. Do one of the following:
   - To turn ringback on, check **Call back if I leave a call on hold or parked**.
   - To turn off callback, uncheck the option.
4. In the **Call back interval** field, enter the number of seconds that Strata CS should wait before calling you back after you hang up.
5. Click **OK**.

Changing your personal Operator

Callers who reach your voice mail or who are waiting on a routing list can always press **0**. By default, 0 transfers them to your system's Operator, but you can transfer them to any other extension, for example your company's auto attendant.

To change the extension to which callers transfer when they press 0

1. Choose **Tools > Options**. The Options dialog box opens.
2. On the General tab, choose an extension on the **Operator** drop-down list. You can choose a user, auto attendant, queue, or IVR Plug-in.
3. Click **OK**.

Customizing your listing in the dial-by-name directory

The dial-by-name directory lets callers dial a user by entering the first few letters of the user's name. Callers who know your name but not your extension can find you quickly in the dial-by-name directory.

You can remove your name from the dial-by-name directory if you want only callers who know your extension to call you. You can also specify whether or not the dial-by-name directory reads your extension to callers.

To customize your dial-by-name listing

1. Choose **Tools > Options**. The Options dialog box opens.
2. On the General tab, uncheck **List in dial-by-name directory** to remove yourself from the directory. If checked, callers can dial you by name.
3. If you choose to be listed in the dial-by-name directory, you can check **Play extension to the caller** to have Strata CS read your extension to callers who find you by using the dial-by-name directory. Callers hear "Transferring to <your voice title> at extension <your extension>."

   If unchecked, callers who find you by using the dial-by-name directory hear only "Transferring to <your voice title>."
4. Click **OK**.

Customizing how long your phone rings

You can specify how long a call rings your phone before it proceeds to the next step on your routing list (in most cases, the next step is your voice mail).

1. Choose **Tools > Options**.The Options dialog box opens.
2. Click the General tab.
3. In the **Ring duration** field, enter the number seconds your phone should ring before a call proceeds to the next step on your routing list.
4. Click **OK**.

Note: Caller ID is transmitted after the second ring. If your phone supports caller ID, you may want to increase this setting so that there is enough time for caller ID to be displayed and read before the call is sent to the next step on the routing list.

Changing ring patterns

You can change how your phone rings when you receive an incoming call. You can set different ring patterns for internal and external calls.

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the Phone tab.
3. Under **Ring patterns**, select the type of ring that you want for **Internal calls** and **External calls**. The "Splash ring" settings create a group of short rings followed by a pause.

   To test a ring pattern, click the button to the right of the drop-down list.

Your phone rings three times in a demonstration of that ring. Because the ring pattern derives from a continuous loop, the first one might be truncated. Listen for the subsequent rings to hear the pattern accurately.

4. Click **OK**.

Enabling and disabling hands-free answering

For an overview of hands-free answering, see “Using hands-free answering” on page 4-9. Use the following procedure to enable or disable hands-free answering from the Client:

1. On the main menu, click **Tools > Options**. The Options dialog box opens.
2. Click the Phone tab.
3. Select the **Enable hands-free answering** check box. Clear the check box to turn hands-free answering off.
4. Enter the desired time in the **Dial tone time-out seconds**. This setting identifies how long a dial tone plays after the end of a call before the station reverts to silence waiting for the next call. A setting of 0 indicates no dial tone, which means that the station reverts to silence as soon as a call ends.
5. Click **OK**.

Enabling and disabling voice-first answering

Note: Voice-first answering will not work when hands-free answering is also enabled.

For an overview of voice-first answering, see “Using voice-first answering” on page 4-10. Use the following procedure to enable or disable voice-first answering from the Client:

1. On the main menu, click **Tools > Options**. The Options dialog box opens.
2. Click the Phone tab.
3. Select the **Enable voice-first answering** check box. Clear the check box to turn voice-first answering off.
4. Click **OK**.

Customizing incoming call behavior

You can customize how Strata CS handles incoming calls, as follows:

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the Incoming Calls tab.
3. Select any of the following options:
   - **Display the Call Monitor.** Brings the Client to the front of your desktop with the Call Monitor showing. If you are actively working in another view, the Client opens the Call Monitor view. If the Client is not running, it will start.
   - **Play the caller's name over the speakers**. Announces the caller's name over your computer speakers if the recording is available. Strata CS users and identified contacts are announced if they have voice titles already recorded. Unidentified callers are announced only if you have call announcing turned on with the prompt to say their names.
   - **Flash the title bar**. Flashes the Client's title bar.
   - **Flash the Call Monitor tab.** Flashes the Call Monitor tab that contains the incoming call. This can be useful if you work with multiple Call Monitor tabs, for example if you are an agent in a call center.
4. Click **OK**.

You can also customize the pattern in which your phone rings, to signal internal and external incoming calls. See "Changing ring patterns" on page 18-7 for more information.

Customizing voice message behavior

You can customize the order in which you hear your voice messages. For example, you can hear your unheard (new) messages in the order newest to oldest, and then you can hear your heard (old) messages in the order oldest to newest.

Setting voice message playback order

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the Voice Messages tab.
3. Under **Voice message playback order**, choose the order you prefer.
4. Click **OK**.

Customizing the Client for Operators

If you are an Operator user, you can use the following options to make transferring a call to the correct user easier and faster:

- **Resize the Transfer To dialog box.** You can make the Transfer To dialog box larger so that you can see more users and more columns at a glance. The next time you open the dialog box it opens at the larger size you set.
- **Viewing users by workgroup .** In the Transfer To dialog box, each workgroup is represented by a tab that lists its members. You can create workgroups that represent the departments of your office, so that when transferring calls you can see at a glance all the users in a given department. For example, if you have to transfer a call to Sales, you can click the Sales tab (for the Sales workgroup) and see all the members of the Sales department and their current personal statuses.

Customizing the Client display

You can customize the Client display by any of the following:

- Showing or hiding Client window elements
- Defining double-click behavior in the Contacts view
- Customizing columns

Showing or hiding Client window elements

You can show or hide the Client's view bar, folder list, status bar, and toolbars by checking or unchecking their entries on the **View** menu.

Defining double-click behavior in the Contacts view

Double-clicking a contact lets you either edit the information for the contact or place a call to the contact.

To define the result of double-clicking a contact

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the View tab.
3. Under **Double clicking contacts behavior**, select the desired behavior.
4. Click **OK**.

Customizing columns

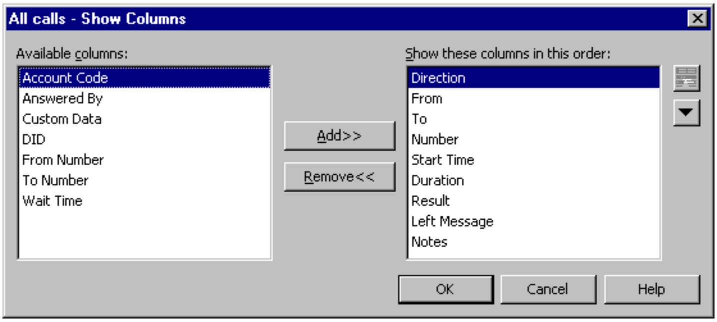
You can choose to show or hide columns in a view. You can also customize columns in a view by moving, resizing, and sorting them. The changes you make to columns in a view are saved when you exit the Client.

Showing and hiding columns

For each view in the Client, you can choose the columns that you want to see in the view. Some views do not show all the available columns by default.

To show or hide columns in a Client view:

1. Choose **View > Current View > Show Columns**. You can also right-click in the view and select **Show Columns**. The Show Columns dialog box opens.



2. Do any of the following:

   - In the **Available columns** list, select a column and click **Add** to show it.
   - In the **Show these columns in this order** list, select a column and click **Remove** to hide it.

   Use the arrows to arrange the columns in the order you want. For an explanation of the columns, click **Help**.

3. Click **OK**.

Moving columns

Click a column header and then drag and drop it to move the column in a view. You can also move columns by using the Show Columns dialog box.

To move columns by using the Show Columns dialog box

1. Choose **View > Current View > Show Columns**. You can also right-click in the view and select **Show Columns**. The Show Columns dialog box opens.
2. Select the column in the **Show these columns in this order** list that you want to be the first column shown in the view.
3. Click the arrows to move the column to the top of the list
4. Continue moving columns by using the arrows until you have the order that you want.
5. Click **OK**.

Resizing columns

You can change column widths by dragging the sides of the column headers.

Sorting by column

Click a column header to sort the items in a view by the information in that column. Click the column header again to sort in the reverse order.

The column in the view that contains an arrow is the column by which the display is currently sorted. The direction of the arrow indicates the order.

Changing how names are displayed

Several views in the Client display names and allow you to sort by the columns in which they appear. For example, in the Contacts view and the Extensions view one column contains names.

To specify how names are displayed in a view

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the View tab.
3. Under **Name Format,** select the format that you want:
   - **First name Last name -** Joe Smith
   - **Last name, First name -** Smith, Joe
4. Click **OK**.

Other customization options

The following table refers you to customization options described elsewhere in this manual.

Feature	Description	See
Recording greetings	Create recordings that callers hear when they reach your voice mail.	page 2-3, page 12-15
Recording a grab-and-hold greeting	Create a recording heard by incoming callers when you put them on hold without talking to them first.	page 10-7
Automatically logging on	Log on to the Client without needing to enter your password.	page 7-4
Changing your password	Change the password you use to log in to Strata CS	page 7-5
Displaying the Call Monitor view automatically	Bring the Client to the front with the Call Monitor showing when you place calls from the Client.	page 10-5
Setting e-mail and pager notification	Receive an e-mail message or a page whenever you have new voice messages.	page 12-4
Setting deletion options	Choose how voice messages are permanently deleted from the Deleted folder.	page 7-18

APPENDIX A

TELEPHONE COMMANDS QUICK REFERENCE

This appendix provides a quick reference to the Strata CS telephone commands. For more instructions on using Strata CS over the phone, see Chapter 3 through Chapter 6.

Note: Press ***** at any time to return to a higher-level menu.

Call announcing commands

If you have call announcing turned on, you can use the following commands when you answer an incoming call. These commands are offered whether you pick up the phone to answer it or answer it after hearing a call waiting beep.

Call announcing commands	
1	Connect to the caller.
2	Send the caller to your voice mail.
3	Send the caller to voice mail and listen to the message as it is being left. Press **Flash 1** to pick up the call while the caller is leaving a message.
4	In call waiting situations, create a conference call with your current call and the new one.
Hang up	Send the caller to the next step on your routing list. Unless you have customized your routing list, the next step is your voice mail, so hanging up is the same as pressing 2.

Call handling commands

As soon as you press **Flash** to put a call on hold, you will hear a context-sensitive menu of call handling options. The caller does not hear these menu prompts. At any time while listening to the prompts, you can press **Flash** again to reconnect to the caller.

Call Handling Commands With a call on the line, press Flash, and then...	
1	Transfer the call.
2	Send the call to voice mail.
3	Disconnect from the call.
4	Reconnect to the call.
5	Create a conference call.
6	Park the call.
7	Silent hold (stops menu until next keypress).
8	Send a Flash to Centrex/PBX service beyond Strata CS.
#	Get a dial tone (start another call).
Flash	Reconnect to the call.

Quick call commands

Pressing * at a dial tone gives you quick access to the commands listed in the following table.

Quick call commands	
***0**	Hear your phone's station ID and extension.
***10**	Enable and disable hands-free answering. See "Using hands-free answering" on page 4-9.
***11**	Enter an account code for the current call or the call you are about to dial.
***12**	Enable adn disable voice-first answering. See "Using voice-first answering" on page 4-10.

Quick call commands	
*55	Hear real-time call center statistics for the queue of your choice.
*66	Redial the last call you placed.
*69	Dial the phone number of your last incoming call.
*70	Disable call waiting for the next call.
*91	Answer another ringing phone. Enter the extension of the phone to answer. See *99 also.
*92	Retrieve a parked call.
*93	Dial a Strata CS user by name.
*95	Manage your calls on hold.
*96	Log off from remote session. Only available at a dial tone when logged in at a remote phone.
*99	Answer another ringing phone within your workgroup. See *91 also.

Quick commands for call center agents

The following commands are available only for agents in a call center queue.

Quick call commands	
*14	Mark the identity of all subsequent outbound calls during your shift, to keep track of which outbound calls are queue-related. To mark all your subsequent outbound calls as being from the queue, press ***14<queue's extension>#**. To mark all your subsequent outbound calls as being from yourself, press ***14#**.

Quick call commands	
***51**	Sign in. The call center queues begin sending you calls. This command changes your personal status to Available (Queue Only). When you sign in with *51, only queue calls ring your phone. Non-queue calls are sent directly to your voice mail. To have all your calls ring your phone, sign in by choosing the personal status Available. **Note:** To receive queue calls, you must be on call with a queue and you must be signed in. Your Strata CS system administrator can tell you the queues for which you are on call.
***52**	Sign out. The call center queues stop sending you calls. This command changes your personal status to Available (Non-Queue). After you sign out, non-queue calls continue to ring your phone. To prevent all calls from ringing your phone, use the Do Not Disturb personal status. See “Using predefined personal statuses” on page 8-3.
***53**	Go on break. The call center queues stop sending you calls, but you are still considered to be signed in for statistical purposes. This command changes your personal status to On Break. While you are on break, non-queue calls continue to ring your phone.
***54**	End wrap-up. This command terminates the wrap-up time that follows a queue call. During wrap-up time the queue does not you send calls. Ending wrap-up makes you available to receive queue calls again.
***55**	Hear real-time call center statistics for a queue. To use *55, you must have been given permission to do so by your Strata CS system administrator.

Voice Mail/Account menu

The Voice Mail/Account menu lets you listen to your voice mail, send messages to other users’ voice mail, and change your Strata CS account settings. You need to log in to access this menu.

Logging in

To log in to the Voice Mail/Account menu, pick up the phone and enter **# <your extension> # <your password> #**

When logging in from your own Strata CS phone, you can skip the extension. Enter **# # <your password> #**.

If your voice mailbox is almost full when you log in, Strata CS prompts you to empty your Deleted folder. Messages in the Deleted folder count against your total space for voice files. For more information, see “Viewing your voice mailbox size” on page 12-15.

Voice Mail/Account menu commands

Summary of Voice Mail/Account Menu Commands			
1	**Voice messages (Inbox folder)**		
2	**Voice messages (Saved folder)**		
	1 Replay	**2** Next message	**3** Delete/Undelete message
	41 Reply	**42** Forward	**43** Call back
		5 Previous message	**6** Save
	7 Rewind	**8** Undelete all	**9** Fast Forward
	# Skip message preamble; skip rest of message		
3	**Send voice message**		
	1 Send	**2** Review	**3** Rerecord
	4 Append	**5** Mark Urgent	**6** Mark Private
	***** Cancel		
4	**Manage greetings**		
	1 Replay	**2** Next greeting	**3** Make active
	4 Rerecord	**5** Revert	**6** Record new greeting
	7 Delete		
5	**Call forwarding**		
	1 To this number	**2** To internal	**3** To external
	4 Cancel forwarding	**5** Query forwarding	**6** Toggle standard call rules
6	**Account preferences**		
	1 Personal status (see next table)	**2** Record voice title	**3** Change password
7	**Have Strata CS hang up**		
#	**Dial tone to start another call**		

Note: Option 7 is available only when logging in from an outside line.

Note: Option 5 1 forwards your calls to the phone at which you are located. This phone can be a Strata CS extension or an external number.

Personal Status commands

The following commands are available after choosing **6 1** from the voice mail/account menu:

Personal Status commands log in and choose 6 from the voice mail/account menu	
1	Available
2	Do Not Disturb
3	In a Meeting
4	Out of the Office
5	On Vacation
6	Available (Queue only)
7	Available (non-Queue)
8	On Break
9	Custom (followed by 1 to select your first custom status, 2 to select your second custom status, and so on)

APPENDIX B

LOGGING ON TO THE CLIENT USING COMMAND-LINE SWITCHES

You can add various switches to the command line that the Client shortcut uses to start the Client. To change the command line, right-click the Client shortcut icon, choose **Properties**, and then click the Shortcut tab. The **Target** field shows the command line.

Add switches to the end of the command line with a space before the switch. You can add multiple switches separated by spaces. For example:

```
C:\Program Files\Strata CS Client\TVClient.exe /Server:Strata CS /station=77
```

The command line switches for the Client are:

- **/allowmultiple**. Enables you to run multiple instances of the Client at the same time on your computer. This is useful for agents of an ACD workgroup who want to log on to one Client to answer call center calls, and another Client to manage personal calls to their extensions. See the example in the next section.
- **/Server**. (Syntax: /Server=<Servername>, for example, /Server=Strata CS). Runs the Client against a specific Strata CS Server on your network. This is useful when you want to have one Client session using a Server other than the one your Client runs against by default.
- **/station**. (Syntax: /station=<station ID>, for example, /station=77.) Makes your Client use a specific Strata CS phone.
- **/user /password**. (Syntax: /user=<username> /password=<password>, for example, /user:Charles Gould /password:2112. The two switches can be used separately.) Use to automatically log on to the Client as a specific user. This is useful for agents of an ACD workgroup who run two Clients. They can set up two Client shortcuts with different /user and /password switches, so that they can launch both and automatically log on to both.

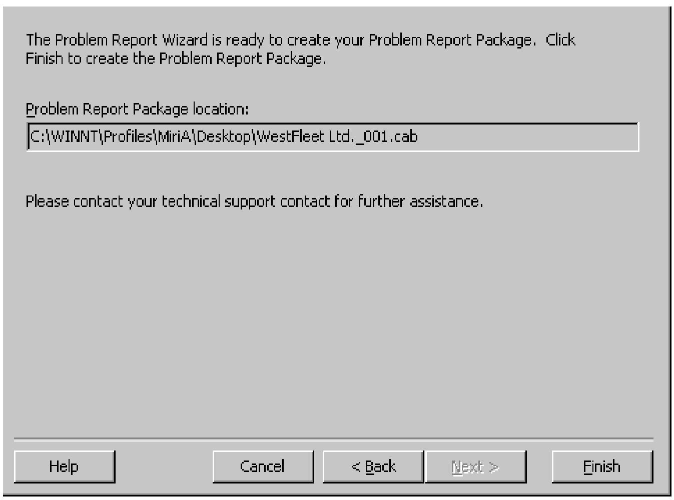
APPENDIX C

REPORTING PROBLEMS

If you experience a problem with one of the Strata CS workstation applications—Client, Administrator, Call Center Reporter, Contact Manager Assistant, or TAPI Service Provider—report the problem to your Strata CS system administrator by using the Problem Report Wizard. The Problem Report Wizard is a tool that asks you to describe the frequency, patterns, and circumstances surrounding your problem.

Based on the information you supply, the Problem Report Wizard isolates exactly when and where a problem occurred, automatically collects the appropriate Strata CS log files and system information, creates a problem report package, and saves the problem report package in the location you specify. When you save the problem report package to the default location—your Desktop—it is represented by an icon similar to the following icon:

To prevent .CAB files from being overwritten, the Wizard gives each problem report package a unique name based on your company name and a unique sequence number, as shown in the following example.



The Wizard increments the sequence number in the file name each time it creates a new problem report package.

To run the Problem Report Wizard

1. Choose **Start > Run**.
2. Enter the following path:

   `C:\Program Files\Common Files\Toshiba\Strata CS\TVPRwizard.exe`

3. Click **OK**. The Problem Report Wizard opens. (If it does not open, ask your Strata CS system administrator for the path to `TVPRwizard.exe` on your system.
4. Answer the questions presented in each Wizard window.

Send the problem report package to your Strata CS system administrator by attaching it to an e-mail message, moving it to another location on the network, or transferring the file. Ask your Strata CS system administrator which method to use.

Because a problem report package can be large, after you send it to your Strata CS system administrator, you should delete it from your system to regain disk space.

To e-mail the problem report package

1. Right-click the package icon on your desktop (or the .CAB filename if you saved the problem report package to a different location.)
2. Choose **Send To > Mail Recipient**. Your e-mail program opens a new message.
3. Address the message and send it.

Reporting a problem with a specific call or message

If you experience a problem with a specific call or voice message, your Strata CS system administrator must gather information from both your computer and the Strata CS Server before contacting technical support. In this case, your administrator may ask you to save your problem report package to a shared folder on the Server.

To save the problem report package to the Strata CS Server

1. Locate the problem call (or the call that left the problem message) in the Call Log view before you start.
2. Run the Problem Report Wizard according to the instructions in “To run the Problem Report Wizard” in this appendix.
3. Check **This problem involved a specific call or voice message**, and then copy and paste the call record from the Call Log view.

   When this box is checked, the Wizard automatically saves the problem report package in the shared folder called Packages on the Strata CS Server. Make a note of the file name so that your Strata CS system administrator can find it easily later.

   If the Packages folder is not found or you want to save the problem report package in a different location, click **Browse** and select the location.

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